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SEPTEMBER 20, 1986

19TH ANNUAL RESTAURANT GROWTH INDEX

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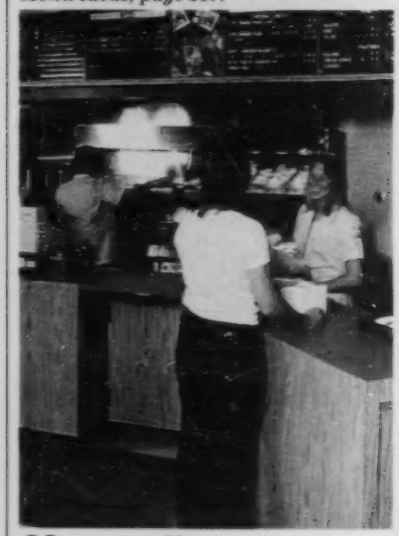

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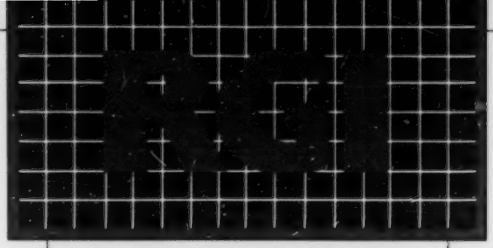
Restaurant Business

COVER STORY

19TH ANNUAL

RESTAURANT GROWTH INDEX

The 19th Annual Restaurant Growth Index (RGI) is our exclusive analysis of the foodservice industry. It begins with a comprehensive report on the eight major market segments—separate eating and drinking places, hotel/motel, transportation, leisure, retail, business and industry, student, and healthcare—and 40 submarket segments. Following this study on page 176 is our statistical profile of the nation's 317 metropolitan areas and 214 ADIs.



In this year's edition of the Restaurant Growth Index (RGI), we provide hard data for 1984, best estimates for 1985 (the last full year), and a five-year projection to 1990 for planning purposes and to quantify trends in the marketplace.

Foodservice sales in 1985 advanced 5.6 percent to a total of $174.2 billion, a nominal gain of $9.3 billion or a real gain of $3 billion. This is one-half the gain of last year. 1985 was not a vintage year for the foodservice industry. Growth was crablike—mostly sideways. Nor is spectacular growth for the industry over the next five years likely.

CONSERVATIVE FIGURE. The 1985 size of the foodservice industry, at $174.2 billion, is a conservative figure as it does not include a commerical equivalent dollar volume for military feeding (troop feeding) or school foodservice (we count as actual sales *only cash paid* by the students), and it does not include vended can soft drinks or vended candy. We show food and beverage (alcoholic and non-alcoholic) sales for establishments with payroll only.*

For 1990, a landmark reference point, we project foodservice sales of $243 billion, just shy of one-quarter trillion dollars or slightly *more* than the increase in the national debt this year. The compound growth rate is 6.9 percent, or $68.7 billion, over five years. *In real terms*, the growth rate is 2.7 percent, or $24.4 billion. This is equivalent to the 1985 foodservice market being 14 percent larger, or the addition of about two entire worldwide McDonald's systems. Even though we view inflation as decreasing from previous years' levels, with an estimated 4.22 percent compound annual increase over the 1985-1990 period, real growth is only 35.5 percent of total growth.

The reason for a lower-than-historical growth rate is that the conditions for a high real and total growth rate have changed. We have increased the available supply of stores from a deficit to an oversupply—*the storing of America*—at the same time that green field sites are not being created in significant numbers. Major chains have been and still are opening up significant numbers of stores as part of a strategy to maximize convenience to the customer base. Most restaurants in America are not destination restaurants and due in part to the numbers of locations, particularly for fast food restaurants, the eating-out public and the take-home public do not and now *need not* go out of their way to satisfy their needs. To some extent, the behavior on the part of the chains is a preemptive strike which is characteristic of market share fights.

THE CONSUMER PICTURE. The consumer side of things does not look especially promising. The growth in the proportion of working women, which has been a major factor in foodservice growth, is slowing down—the number of women entering the workforce has already peaked. Consumer lifestyles have shifted to more home-centered activities, including the heavy use of VCRs. Growth in income is lackluster; wage gains are limited as the huge baby boom generation moves squarely into the mature workforce and by our noncompetitive cost position in world trade. The consumer, who is not getting high wage increases, is also financing purchases of large ticket items on credit and is cash-poor, a situation which is likely to persist for the next several years.

For the mass market, growth will be keyed to convenience and perceived price-value satisfaction. American consumers want to save time and get the best value for their dollar. Taking into account this background of basic consumer conditions, the winners and los-

Industry Real Growth Summary

	1984 % Real Growth Rate	1985 % Real Growth Rate	1985-1990 % Real Compound Annual Growth
Total Market	4.0	1.8	2.7
Commercial/Contract	4.8	2.3	3.1
Institutional/Internal	−1.1	−1.2	−0.8
Military	3.6	3.1	1.8
MAJOR MARKET SEGMENTS:			
Eating/Drinking Places	4.8	1.9	2.7
Eating Places	5.5	2.4	3.2
Full Menu Restaurants & Lunchrooms	4.9	2.1	2.6
Limited Menu Restaurants	6.5	3.0	3.9
Hotel/Motel Market	5.2	2.8	3.3
Transportation Market	5.5	5.8	5.5
Leisure Market	0.9	1.1	2.3
Retail Market	10.8	10.7	10.6
Business/Industrial Market	4.3	0.8	1.5
Student Market	−0.2	−0.4	−0.9
Health Care Market	−2.3	−1.6	−0.9

1. Wholesale food price index will increase at 2.14% compound annual rate for the five years 1985-1990. This is a modest drop from the 1984-1989 rate of 3.15%. Menu prices will increase at a 4.22% compound annual rate for the five-year period 1985-1990.

Foodservice Industry Summary	1984 Sales ($000,000)	1984 Units	1984 Purchases[1] ($000,000)	1984 vs 1983 % Sales Growth	1985 Sales ($000,000)	1985 Purchases[1] ($000,000)	1985 vs 1984 % Sales Growth	1990 Sales ($000,000)	1985-1990 % Compound Annual Sales Growth	
									Nominal	Real
Total Market	164,950	590,199	68,582	8.4	174,253	71,676	5.6	242,992	6.5	2.7
Commercial/Contract	143,263	440,895	54,311	9.1	152,171	57,404	6.2	217,814	7.4	3.1
Institutional/Internal[2]	20,861	148,048	12,014	3.8	21,198	12,024	1.6	23,990	2.5	−0.8
Military[3]	826	1,256	2,257	7.8	884	2,248	7.0	1,188	6.1	1.8
MAJOR MARKET SEGMENTS										
Eating/Drinking Places	112,776	317,920	39,510	9.0	119,369	41,811	5.8	167,929	7.1	2.7
Eating Places	104,521	260,099	36,564	9.7	111,131	38,871	6.3	159,541	7.5	3.2
Full Menu Restaurants	55,112	124,869	19,622	9.1	58,444	20,808	6.0	81,688	6.9	2.6
Limited Menu Restaurants	43,719	117,604	14,950	10.7	46,736	15,981	6.9	69,568	8.3	3.9
Hotel/Motel Market	10,026	25,785	3,212	9.4	10,698	3,426	6.7	15,470	7.7	3.3
Transportation Market[4]	2,528	423	1,104	9.4	2,774	1,211	9.7	4,432	9.8	5.5
Leisure Market	4,737	19,834	1,780	5.1	4,975	1,868	5.0	6,847	6.6	2.3
Retail Market	5,394	87,384	1,890	15.0	6,184	2,162	14.6	12,554	15.2	10.6
Business/Industrial Market	9,601	11,427	9,871	8.5	10,045	10,041	4.6	13,335	5.8	1.5
Student Market	8,194	93,453	5,179	5.5	8,508	5,096	3.8	10,014	3.3	−0.9
Health Care Market	11,484	32,986	5,609	2.5	11,536	5,648	0.4	12,415	1.5	−0.9

1. Purchases include all food, nonalcohol and alcoholic beverages (does not include equipment or supplies).
2. Community center sales and purchases which are counted in Institutional/Internal sales and purchase totals are not shown in detail in the eight major groups.
3. Sales data based on post exchanges and military clubs; purchase data based on post exchanges, military clubs and troop feeding.
4. Sales of terminal facilities and highway (interstate) are included in Eating Places for addition to total market figures.

Note: Full menu and limited menu restaurant sales are included in eating place sales. Eating place sales are included in eating and drinking place sales and should not be added with other major market segments to arrive at total market sales.

ers show up with some clarity.

WINNERS AND LOSERS. The big winners are the convenience food stores and gasoline service stations which sell meals and snacks, and the grocery stores which are making it much easier to buy take-home foods or on-the-spot, impulse food purchases. The convenience store grouping is by far the fastest-growing subsegment, with a compound annual growth rate of 21 percent. This high-powered growth steals some of the thunder from traditional fast food growth; by 1990, foodservice in the convenience store group will comprise 12.2 percent of all fast food sales (versus 7.0 precent of fast food sales in 1985).

The transportation market will do quite well—at 5.5 percent real growth—because of consumers' desire for experience and their ability to fulfill that desire by taking advantage of low promotional airfares and price wars among the carriers. As a partial consequence, hotels will do modestly well with 3.3 percent growth.

The big losers are centered in the institutional sector of the foodservice marketplace with Hospital—Internal a major loser, down 3.6 percent in real growth because of reductions in patient stays resulting from government cost-cutting. The College—Internal submarket also loses (down 3.1 percent) as the college population declines. However, there are opportunities for contractors in each of these markets as management and cost containment become more valued.

SUMMARY. In summary, the prospects are for continued but moderate growth. The continuing consolidation of the industry in a tougher operating environment will give rise to mergers and business failures, but will also create new opportunities for savvy businessmen. Convenience and the maintenance of a standard of quality will be the industry's primary growth motivators for some time to come. ■

**Higher sales values can be generated by approaching the data somewhat differently.*

If we adjust our figures to reflect the higher sales values generated by the addition of military troop feeding and school foodservice commercial equivalents and the additional volume in vending categories now included, we would show industry sales $19.5 billion higher for a new total of $193.8 billion. This total is 11.2% higher than our basic estimates.

In our view, these adjustments are not valid because they produce a result which is in turn inflated (military and school feeding), and not comparable (candy sales are not included in the Census of Retail Trade's merchandise line for meals and snacks, non-alcoholic and alcoholic beverages). In the case of can and bottle soft drinks through vending machines, they are sold through a restricted wholesale distribution network.

This summary was prepared by RBI research and Malcolm M. Knapp, president of Malcolm M. Knapp, Inc., New York. The 1984 sales and purchases data used in this report—covering growth in nine major markets and 40 submarkets—were prepared by Mr. Knapp under contract with the National Restaurant Association (NRA), Washinton, DC. Estimates for 1985, and projections to 1990, were prepared specifically for Restaurant Business Magazine.

SEPARATE EATING AND DRINKING PLACES

Convenience and price-value are driving the segment, giving rise to many new concepts.

Restaurant operators today are competing in a challenging marketplace which revolves around the demands of a knowledgeable, discerning consumer. With more dining out options than ever, plus more prepared foods to bring home, consumers have learned to be choosy. They have high expectations in terms of quality and convenience, and they know they have the right to demand either—and sometimes both—at reasonable prices.

To remain profitable despite the competition, restaurant operators are finding ways to do business more creatively and less expensively. They are looking at additional ways to attract customers, by adding services such as take-out and delivery, and by tailoring flexible menus and hours of service to patrons' needs and tastes. To help keep the bottom line solid, they are building smaller, more productive units where extensive seating is not necessary, and they are co-building units with other concepts which saves on real estate costs. They are marketing foods that appeal to Americans' interest in fresh, light, wholesome foods—salads, pasta, fish—and to their desire for treating themselves—home-baked goods, premium ice creams, and chocolate, chocolate, chocolate. And they are experimenting with ethnic and other trendy foods that cut the boredom factor and bring in new customers.

BISTROS ARE BOOMING. Bistros—informal restaurants with table service, quality food, and reasonable prices—are catering to the consumer who has accepted eating away from home as a fact of daily life. Borrowing from European influences—where brasseries, bistros, and cafes are a convivial experience at any time of the day or night—chains and independents are adapting this comfortable eating format to their individual markets. Such concepts seem the perfect way to attract the affluent, 25- to 45-year-old set that is driving the frequency dining boom.

In many ways, the new bistros are a step up from the casual theme restaurants so beloved in the late '70s: They have more sophisticated food and ambience, yet still weigh in on a moderate price point. Lane Cardwell, senior vice president of strategic planning for Dallas-based S&A Restaurant Corp., calls it casual dining with class.

NICE EXPERIENCE. "People don't have to give up comfort, quality food, and sometimes even elegance for casual attire," he says. "They want a nice experience; they don't want to make a big deal of it." Responding to a consumer desire for bistro-type restaurants, S&A has added two such concepts to its Bennigan's and Steak and Ale chains: Bay Street and Key West Grill. Bay Street features a seafood/Cajun/pasta menu in a relaxed room with big overhead fans and a Cape Cod ambience. With nine open, seven more due by May, 1987, and 100 by 1990, S&A is demonstrating a sincere commitment to Bay Street. The 250-seat units generate average annual volumes exceeding $2 million each, with checks averaging $8 for lunch and $15 for dinner.

Complementing Bay Street is Key West Grill, a new Caribbean-style concept with a more casual decor; the first was set to open this month. Grilled meats and seafood distinguish the menu, and additional specialties include stone crab claws, smoked baby back ribs, conch fritters, beer cheese soup, and key lime pie; entree prices range from $3.95 to $12.95. With 224 seats, the first unit is expected to generate annual sales of $1.5 to $2 million.

CITIFIED. In large cities such as New York, Chicago, and Los Angeles, the bistro trend often combines unusual but casual decors with selections of quality foods. In New York, Fiasco serves Northern Italian cuisine in a "high-class, funky" atmosphere, says Leonard Friedman, who owns Fiasco with his wife Carol Ann Friedman and partner Arlene Towers. "I think people are tired of going to a high-ticket restaurant and acting like stuffed shirts," Friedman speculates. "They want a quality product in a relaxed atmosphere where they can enjoy themselves and come back more than once a month." From Fiasco's varied menu, a variety of pastas and an assortment of seafood dishes sell well to a strong repeat base of neighborhood residents and trend-conscious Manhattanites who travel to dine there. A la carte entrees run from $8 to $12. Fiasco's chic decor combines grey walls splashed with paint, fanciful wall sconces and butcher paper-covered tables.

In Chicago, an upscale bistro-style restaurant called Zincs, owned by the investor group Presidential Zinc Inc., is bringing "everyday" French food to its own loyal customer base in Chicago's burgeoning West Loop area. Located in what will be a 2,400-unit residential complex—only a 10-minute walk from the Loop's business area—Zincs specializes in baguette sandwiches, French-style pizzas, and classic French entrees selling to a well-

PHOTO BY STEINCAMP & BALLOGG

heeled customer base. Although it's presently operating out of a satellite kitchen and serving only in the bar area, upon completion next month Zincs will include a 100-seat dining room plus another 180 bar and banquet seats.

"The long-term success of the brasserie-style restaurant in France convinced us of the possibilities here," says manager Betsy Levin. "We offer a good price-value relationship and quality food." Sandwiches on the present menu average under $4, and, although more expensive choices will be offered out of 75 selections, the dining

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Cafe Ba-Ba-Reeba, one of Lettuce Entertain You's newest restaurants in Chicago, specializes in tapas (Spanish appetizers), tapping both the ethnic food and grazing trends.

room menu will include fixed price meals for $9 to $13.

"People are going out to eat more and more, and a concept like ours won't tire as trendy concepts do," predicts Zincs' general manager Michael Sacks.

In Dana Point, CA, 200-seat Picasso's features "creative continental cuisine" in a room studded with palm trees and pink lighting, which the owners refer to as "tropical elegance." Picasso's bistro-style concept features a jazz band on an outdoor patio and fine foods such as escargot casserole and roast duck in tamarind sauce. Checks average $10 for lunch, $25 for dinner.

RETRO. A move back to restaurants resembling the diners of decades past also blends into the bistro/casual dining. Although interpretations differ with every owner, these casual restaurants serve reasonably priced meals of good food for competitive check averages. Fog City Diner, in San Francisco, serves contemporary American cuisine in an atmosphere of quilted steel and black-and-white tile. Betty Brown's, in New York, features nostalgic foods like cheeseburgers, American chop suey (ground beef, elbow macaroni, and spaghetti sauce) and soda fountain specialties by the dozens. And Denny's Inc., the 1,000-plus unit chain based in La Mirada, CA, began testing Brentwood's, an upscale version of an old-fashioned coffee shop. The one-unit test, in Costa Mesa, CA, is open 18 hours a day. Its decor is more upscale than Denny's, with pastel colors and curved-back chairs. Food choices are more creative, with options such as French toast made with corn flakes and Italian-style frittatas. A separate bar area serves wine and liquor. Checks average $4.95 for breakfast, $8.95 for lunch and dinner.

Healthy and light foods have become mainstays on many menus, offering patrons a choice.

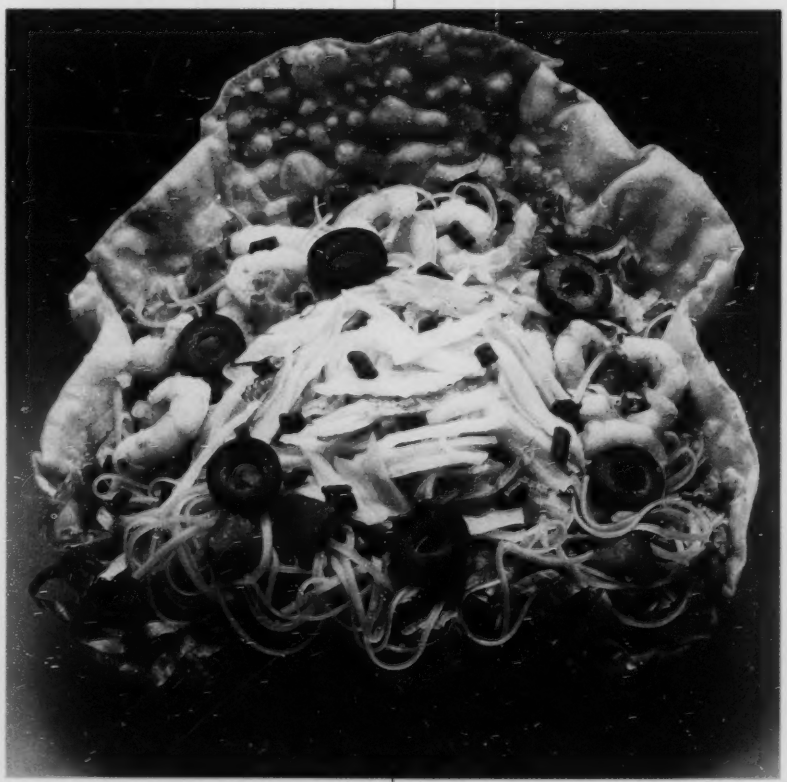
SUITABLE FOR SAMPLING. Casual dining with quality food and reasonable prices is manifesting itself in another way—with grazing restaurants. Flexible, all-day menus comprised of mix-and-match appetizers, with or without a generous selection of entrees, distinguish the restaurants that cater to a busy, sophisticated customer who may not want a full meal but who does want quality food.

Chicago's Lettuce Entertain You Enterprises, the innovative company headed up by Rich Melman, opened its version, Cafe Ba-Ba-Reeba, earlier this year. Featuring Spanish cuisine in "tapas" portions, Cafe Ba-Ba-Reeba is educating the consumer to an unfamiliar cuisine and an unfamiliar eating style simultaneously.

GRAZING. New American cuisine, appetizer-style, is bringing in the pre-and post-theater clientele of New York City's Broadway area at Square Meals, owned by Mark Gerstein and Kevin Flanigan. Here, bite-sized foods are thought of as building blocks to a whole meal.

In Los Angeles, La Menagerie, owned by John Groene and Robert Blaisch, serves small portions of food with Oriental and European influences; McAbee Beach, owned by Jack Dravinski and Glenn Hammer, does it with California Cuisine; and Piero Selvaggio's Primi serves Italian cuisine grazing style: antipasto, pastas, and other foods suitable for sampling.

"Niche marketing" is the phrase of the year when it comes to new con-



Taco Bell was among the legion of chains which added salads and light foods to counteract the customer "veto factor." Pictured is a seafood salad in a taco shell.

Key West Grill, set to open this month, is S&A Restaurant Corp.'s entry in the booming bistro field; bistros are viewed by many as the logical evolution of the casual dining trend.

cepts; the widespread, competitive emulation that ensues when it seems as if an operator has found an untapped niche has given rise over the past few years to a number of wildfire trends, including the pizza-and-entertainment concepts and the gourmet burger boom (both of which turned out to be a disappointment). Though some of these "niches" may have all but disappeared, never fear the demise of the creative businessman: New trends are underway.

FIND THAT NICHE. The Sunbelt, for instance, sees a proliferation of burger express restaurants, drive-thru and walk-up-only limited menu fast food restaurants. As many as 20 chains are declaring regional dominance and planning to franchise all around the country in no time at all. By selling quarter-pound hamburgers for under a dollar and one size each of soft drink and fries, owners of the burger expresses find that investments as low as $150,000 bring in sales of $500,000 in a year. Because the buildings are so small (as little as 12 ft. x 12 ft.) and no parking lots are required, burger expresses can sit on odd-shaped lots and shopping center pads, requiring inexpensive real estate while maintaining visibility. Major players include Central Park (based in Chattanooga, TN), Beefy's (Nashville), Grand Junction (Lexington, KY), Skooters (Birmingham, AL), Buns (Atlanta), and Hooker's Hamburgers (Naples, FL).

Established fast food hamburger chains including Hardee's (Rocky Mount, NC), Sonic (Oklahoma City), and Whataburger (Corpus Christi, TX) are testing express units similar to those of the new chains, planning to use the smaller, limited-menu prototypes to fill in existing markets.

BAKERY BOOM. Cinnamon rolls and muffins are the feature of another booming niche of limited-menu foodservice enterprises. Following Kansas city, MO-based T.J. Cinnamons, the growing chain operated by Ken Hill, formerly president of Gilbert/Robinson, businesses such as Chicago Cinnamon Company are lining up customers. Baking is also big business for a number of operators cashing in on the popularity of muffins—perceived as healthier than donuts and Danish—such as Chicago's All My Muffins, Canada's Muffin Oven with units in Los Angeles, and Chicago's one-unit Newbury Muffins. And consumers' interest in quality baked goods in general has prompted many operators to promote on-premise bakeries, including the Dallas-based Black-eyed Pea chain of homestyle restaurants and Carrows Restaurants, a 90-unit coffee shop chain out of Santa Barbara, CA.

HEALTHY STAPLES. Don't be misled by all the success the purveyors of high-calorie foods are having, however: The consumer who eats out often *does* want a choice of a healthier or lower-calorie option when dining out. It's just that when he indulges, he wants the best. Many of the chains that targeted the market seeking a healthy meal straight on have met with difficulties. A number have filed for bankruptcy, and others have experienced either growth stagnation or have closed units. The troubles of chains including D'Lites of America (based in Norcross, GA), The Good Earth (Orlando), Nankin Express (Eden Prairie, MN), The Fresher Cooker (Louisville, KY), and Tokyo Bowl (Aurora, CO), indicate that a restaurant specializing in healthy food isn't likely to draw a sufficient market share.

Taking their place for health- and calorie-conscious eaters are pasta, seafood, and salad additions to menus at other restaurants. Although they're not new, these foods have recently es-

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tablished themselves as new staples of American eating.

VETO FACTOR. Many chains have found that offering alternate choices of healthy foods eliminates the "veto factor" of one member of a group who is watching his consumption. Wendy's International (headquartered in Dublin, OH), Burger King (Miami), and Carl's Jr. (Anaheim, CA) attacked the problem first by offering salad bars, and last year Wendy's also began merchandising a light menu, while Burger King more recently replaced beef fat with vegetable fat for cooking all fried items except fries. McDonald's is experimenting with alternative oils too.

Taco Bell, based in Irvine, CA, added a seafood taco salad. Long John Silver's Seafood Shoppes (Lexington, KY) and Arthur Treacher's (Youngstown, OH) are trying broiled or baked fish platters. Country cookin' Po Folks Inc., Nashville, added three salads to its menu: chunks a' chicken salad, seashore salad, and shef's salad (sic). Bob Evans Farms, out of Columbus, OH, added five charbroiled entrees (barbecued chicken, pork chops, ribs, steak, and halibut). Steak and Ale, Dallas, TX, added baked fish platters to its dinner menus, with unit managers choosing from four to seven selections from a total of 15 per day. Even Friendly Restaurants, Wilbraham, MA, a coffee shop chain known for its ice cream, rolled out a light menu this year.

Competition has forced many players to add new menu items just to keep market share.

DELIVERY'S DOMINANCE. Tailgating on Ann Arbor, MI-based Domino's Pizza's success, chains and independents nationwide are gearing up with plans to be the number two pizza deliverer. With special delivery-only stores, Wichita, KS-based Pizza Hut is hoping to beat them all by using its financial resources to catch up to Domino's first. But Tulsa, OK-based Ken's Restaurant Systems is also rapidly expanding its Scooter's Pizza Delivery chain, which is also testing chicken delivery; Memphis-based Dobbs Houses is testing its DePizza Delivery concept; Pizza Transit Authority, formerly of Chapel Hill, NC, is rethinking its concept under the new ownership of former franchisee Pizza Delivered Quick, of Lexington, KY; and nearly every already-established pizza chain is adding or testing delivery to keep up with competion. In fact, Little Caesar Enterprises, the 1,000-unit chain based in Farmington Hills, MI, is the only major player featuring neither seating nor delivery. Price-value and convenient take-out service remain Little Caesar's niche, as it sells two pizzas for the price of one.

Delivery is expanding beyond the realms of pizza. Chicken—an item both popular and portable—is joining pizza in thermal bags, and everyone's trying to find a way to deliver hamburgers, Chinese food, and gourmet salads. Besides Scooter's, Golden Skillet International (Richmond, VA) and Kentucky Fried Chicken (Louisville, KY) are testing delivery of fried chicken, while Dino's Chicken (Lexington, KY) sells take-out and delivery-only charbroiled and barbecued chicken, and Wing'N It, owned with Numero Uno by Gelet Enterprises of Woodland Hills, CA, sells take-out and delivery-only fried, barbecued, and marinated chicken.

BIGGER, BETTER BURGERS. The fast food hamburger chains spent the year—as usual—fine-tuning their menus. Three of the big four "improved" their burgers: McDonald's added the McD.L.T., Burger King enlarged its Whopper, and Hardee's introduced a completely new burger product. Hardee's and McDonald's are also implementing improved cooking equipment in their units: They're testing top-side grills, which cook the hamburgers from the top and bottom at the same time, which reduces cooking time, prevents shrinkage, and results

Nugget Mania continues: Roy Rogers was one of the latest companies to add this ever-popular finger food to its menu, joining Wendy's, Burger King and, of course, McDonald's.

Separate Eating & Drinking Places	1984: $112,776,000,000 + 9.0% Sales Growth				1985: $119,369,000,000 + 5.8% Sales Growth			1990: $167,929,000,000 + 7.1% Compound Annual Sales Growth		
	1984 Sales ($000,000)	1984 Units	1984 Purchases ($000,000)	1984 vs 1983 % Sales Growth	1985 Sales ($000,000)	1985 Purchases ($000,000)	1985 vs 1984 % Sales Growth	1990 Sales ($000,000)	1985-1990 % Compound Annual Sales Growth: Nominal	1985-1990 % Compound Annual Sales Growth: Real
Separate Eating Places	104,521	260,099	36,564	9.7	111,131	38,871	6.3	159,541	7.5	3.2
Full Menu Restaurants & Lunchrooms	55,112	124,869	19,622	9.1	58,444	20,808	6.0	81,688	6.9	2.6
Limited Menu Restaurants	43,719	117,604	14,950	10.7	46,736	15,981	6.9	69,568	8.3	3.9
Public Cafeterias	3,166	6,079	1,144	8.4	3,273	1,183	3.4	4,486	6.5	2.2
Social Caterers	1,241	3,581	459	8.1	1,302	482	4.9	1,829	7.0	2.7
Ice Cream, Frozen Custard Stands	1,283	7,966	389	9.3	1,376	417	7.2	1,970	7.4	3.1
Bars & Taverns	8,255	57,821	2,946	1.2	8,238	2,940	−0.2	8,388	0.4	−3.7
Total	112,776	317,920	39,510	9.0	119,369	41,811	5.8	167,929	7.1	2.7

in a plumper burger. Remote earphones are another innovation in fast food restaurants. In high volume units, an employee sits near the order board so customers speak directly with the person, who then communicates the order via two-way radio to the kitchen. The remote earphones are geared to reduce errors.

NUGGET MANIA. But the burger chains seem most excited about boneless fried chicken. Echoing on the success of McDonald's McNuggets, most chains that didn't add nuggets to their menu boards last year added them this year. Burger King debuted Chicken Tenders, Wendy's offered Crispy Chicken Nuggets, Roy Rogers came out with Chicken Nuggets, and Hardee's is rolling out two nugget products—a processed nugget and a whole muscle nugget—and will decide which to use in specific markets depending on the competition. Nuggets are not confined to hamburger and chicken chains alone. Long John Silver's Seafood Shoppes improved its Chicken Planks, and Taco Time International (based in Eugene, OR), a fast food Mexican chain, introduced Nuggets Ole! Dairy Queen/Brazier of Minneapolis took the nugget a step further by developing the beef nugget.

Hoping to find its own niche within the breakfast daypart, Wendy's last year rolled out a made-to-order breakfast into all its units nationwide. A few short months later, pointing to a soft market for restaurants in general, Wendy's repealed the requirement to serve breakfast, offering franchisees the option instead in each unit.

DOUBLE DEVELOPMENT. Sharing strengths and resources, restaurant chains are co-building real estate with other foodservice concepts, lodging facilities, and convenience store chains. The result is joint building: Two unrelated concepts share a lot or a building and, while conserving real estate costs, profit from each other's business. In some cases, one franchisee will own both concepts. In other cases, one company will franchise the other's concept. A third option is for both companies to own their halves.

Over the past year, a number of foodservice companies decided to co-develop restaurants on lots with other restaurants or businesses of other kinds. Taco John (Cheyenne, WY) and Bresler's 33 Flavors (Des Plaines, IL) are co-building units. So are International Dairy Queen and Mister Donut, both of Minneapolis, and Dairy Queen and Grandma Gebhard's Cookies. Taco del Sol, based in Lincoln, NE, is sharing a lot with its own more upscale concept, Tia Zia.

In marriages between foodservice companies and other chains, La Mirada, CA-based Winchell's Donut Houses, hooked up with ARCO's AM/PM gas station convenience stores; Hooker's Hamburgers agreed to build on Circle K lots; Skooters matched up with Cubberds conve-

continued on page 140

nience stores; and Wendy's made plans to build on K-Mart lots. The 7-Eleven convenience store chain has agreements for three restaurant chains to open units on its sites: Hardee's; Church's Fried Chicken (based in San Antonio, TX), and Rocky Rococo (Madison, WI). Wendy's is also hooking up with Atlanta-based Days Inns of America, and Arby's has second shot at those lots. Denny's is building on San Antonio, TX-based La Quinta Motor Inns lots; TGI Friday's, headquartered in Dallas, is opening on Minneapolis-based Radisson Hotel lots; and Shoney's (Nashville) continues to build on Shoney's Inn lots.

BIG BUSINESS. Consolidation continues to keep the restaurant industry in the news. W.R. Grace of New York bought the seven-unit, Washington, DC-based American Cafe group; Ramada, headquartered in Phoenix, bought Long Beach, CA-based Marie Callender Pie Shops; Greyhound Food Management, also of Phoenix, bought Cassano's Inc. of Dayton, OH. Friendly Ice Cream Corp.—parent of Friendly Restaurants—after 50 years of conservative growth, purchased two small family restaurant chains: Franklin's (Kingston, PA), and the Idlenot Farm restaurant chain (Springfield, VT). Collins Foods International of Los Angeles bought half of Naugles, Inc., Fullerton, CA, although the Mexican fast food chain continues to struggle with decreased customer counts.

Convenience may be the growth niche of the '80s—good news for take-out and drive-thru.

GETTING BIGGER. In a move making two giants even bigger, Marriott Corp., Washington, DC, announced plans to acquire Menlo Park, CA-based Saga Corporation, the diversified foodservice company that encompasses contract catering, dinner houses, and fast food restaurants. It also purchased the restaurant division of the Howard Johnson

Sophisticated dinner houses like S&A Restaurant Corp.'s Bay Street entice customers with moderately priced menus, high-quality fresh foods, and a casual yet stylish ambience.

Skooters, "The Biggest Name in Little Restaurants," represents the growth of burger express chains expanding in the Sunbelt. Drive-thru/walk-up service and limited menus distinguish the concepts.

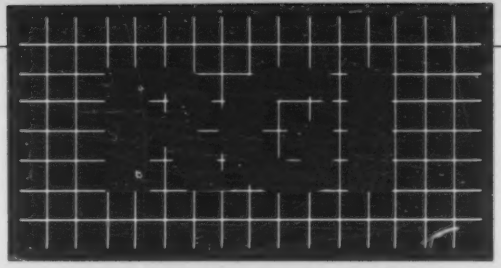
Company, North Quincy, MA. Dallas, TX-based USACafes, Inc., parent of Bonanza, spent most of the year chasing—unsuccessfully—competitor Ponderosa Inc., Dayton, OH. Custom Creamery bought Orange Julius International, Santa Monica, CA, and adopted its name. And PepsiCo, the Purchase, NY-based owner of Pizza Hut and Taco Bell, agreed to purchase Kentucky Fried Chicken, a move which would make PepsiCo the largest foodservice company in the country.

"I think the trend toward consolidation will continue," predicts industry analyst Steven Rockwell, vice president of Alex. Brown & Sons Inc., Baltimore. "The overall growth of the market has been slow the last couple of years due to soft demand, and that doesn't seem to be changing. The result is that a number of companies are performing very poorly, and that presents them as attractive acquisition candidates. In fact, for the real estate alone they are worth buying."

Consolidation won't significantly affect the nature of the restaurant market, however, Rockwell projects. "The top 100 chains still account for only 40 to 45 percent of total eating and drinking place sales, which means that the industry is still very highly fragmented," he notes.

BUYING OUT. Leveraged buyouts haven't yet let up either. Over the past year, executives of Jack In The Box, San Diego, and Sonic Industries Inc., Oklahoma City, announced leveraged buyouts. W.R. Grace's California-based restaurant group is in the process of undergoing a leveraged buyout. Executives of Pizza Inn Inc., Dallas, this summer announced plans to initiate one. And when Minneapolis-based Pillsbury bought Diversifoods, Chart House executives proposed a leveraged buyout of the dinner house chain.

And as if competition were not enough, operators face the often-unforeseen irritations born in the legislative buildings of Washington. With budget-cutting and tax reform major issues that will change the way America spends its money, independents and industry executives are just waiting to see what laws will go through and how their businesses will be affected. One issue particularly worrying operators of upscale restaurants in the change in tax laws about business meal deductibility: It seems likely that business meals will be only 80 percent deductible when the pending tax package finally passes, despite desperate efforts on the part of the restaurant industry to preserve the full deduction.–**Rona Gindin**



THE HOTEL/MOTEL MARKET

Segmentation, consolidation, and overbuilding characterize the current state of the hotel industry. The combination of these factors has chains and independents scrambling to introduce new products, enter different market segments, and acquire complementary businesses.

SEGMENTATION IMPORTANT. Saul F. Leonard, national partner, Leisure Time Industry, for Laventhol & Horwath (L&H), describes the lodging sector's "strategic redirection" as a neccessity for the hospitality industry, which is approaching a "mature phase" in the traditional product lifecycle. As a result, long-range strategic planning has taken the form of segmentation. He notes: "This means an effort to grow by either building or aquiring new types of hotels that are targeted to specific types of travelers."

Charles A. Bell, a hotel and restaurant management consultant, points out that segmentation has spawned new concepts which attract first-time customers to budget or moderate hotels or lure business travelers from large convention hotels to smaller suite or deluxe hotels.

The proliferation of new concepts—including smaller, more intimate hotels, all-suite hotels, mega convention hotels, and budget properties—by several chains are targeted to meet the needs of the traveling public's changing lifestyles, values, work habits, and expectations for overnight lodging.

ROLE OF FOODSERVICE. Foodservice continues to play an important role as chains and independents seek to differentiate themselves by offering market-tailored menus, healthy alternatives, home-style foods, and even take-out options. According to RGI statistics, the total hotel-motel foodservice market grew a relatively healthy 6.7 percent in 1985, driven mainly by the hotel subsegment.

Competition is segmentation: all-suite hotels, smaller properties, and alternative sites.

Overbuilt conditions and changes in the tax laws concern Fred Rufe, director of food and beverage planning and development for New York-based Hilton International Co. (HI). Indeed, the chain pulled its proposed Vista Hotel out of Philadelphia and closed the two-year-old Vista in Oklahoma City. "We felt that Philadelphia was overbuilt; and the poor economy in the oil belt made the Oklahoma Vista unprofitable," he explains. Those closings do not, however, imply an abandonment of the domestic market for HI, better known for its international properties. (Currently there are 90 HI properties in 44 countries.) A Vista hotel is scheduled to open in Pittsburgh at year-end, and 1987 will see the opening of a Vista at New Jersey's Newark Airport, one of the country's fastest growing hubs.

HI's menu prices are being determined with an eye towards tax reform; at the American Harvest restaurant in the New York Vista, a $24.95 complete dinner consists of a choice of appetizer, entree, vegetable, and dessert taken from a number of selections found on the American Harvest menu, which changes monthly and reflects the seasonality of fresh indigenous products.

"When those tax laws go into effect, all of the 'expense account' restaurants are going to suffer," Rufe insists. "We anticipate the increased popularity, and profitability, of the $24.95 dinner to increase."

PLANNING PROFITS. Profitability is also high on the priority list for John Fleming, corporate director of food and beverage for Phoenix-based Doubletree Hotels Inc. Explains Fleming: "Filling the rooms and the seats in the restaurants is a challenge in the best of times. But we are in questionable times and find ourselves faced with an overbuilt environment and a wobbly economy. There is a definite challenge."

In order to survive and indeed prosper in today's environment, Fleming explains that the company's thrust is product differentiation. As a relatively small chain (with 15 hotels currently open and 10 in development), Doubletree has the advantage of being able to act and react quickly. Fleming notes that the company has used its size to its advantage by launching an intensive guest services package." The emphasis of the program is "quick response" to guest needs by such services as speedy check-in and check-out, a "white glove" test for cleanliness, and an on-site guest services representative at every hotel.

A key foodservice marketing tool that serves the purpose of product differentiation is the welcoming batch of premise-made chocolate chip cookies that are placed at the bedside the first night of each guest stay. In addition, the company offers a five-minute breakfast and 15-minute roomservice. Should the hotel fail to deliver on the promise, the meal is on Doubletree.

HEALTHY EMPHASIS. Fleming is quick to point out that foodservice receives more than "just lipservice" from the company. Restaurants and menus are not stamped out but rather are tailored to reflect the needs of both

the traveler and the local restaurant customers.

For example, the recently introduced "Natural" menu and the High Fiber Breakfast Sampler are offered as alternatives to help the business traveler eat well while on the road. Although the sampler has been well-accepted in most locations, on the health-crazed West Coast, it is particularly popular, accounting for 10 percent of breakfast orders.

The interest in the link between diet and health is also evident at The Colonnade Hotel, an independently owned facility in Boston. The consumer's demand for healthy foods led to the recent introduction of a new menu in the hotel's signature restaurant, Zachary's. Described as "continental naturelle," the items—which were developed and analyzed by a health consultant—are a blend of nouvelle and classical cuisines and are comprised of fresh ingredients. The nutritional composition, including the calorie content, is available to the guest.

FINE-TUNING. Don Clawson, vice president of food and beverage for Minneapolis-based Radisson Hotel Corp., emphasizes that foodservice must be an "evolving philosophy." Clawson insists that it is necessary to constantly fine-tune even the most carefully planned concepts.

As an example, he points to the changes made at the Mark Plaza Hotel in Alexandria, VA. "Gallatin's, the signature restaurant was over-priced for our customers," he notes, adding, "There were two major problems: The time of service was too long and the perceived value was too high. As a result, we were only pulling the top two to four percent of our market." To combat the problem at Gallatin's, the menu was completely reworked and transformed from high-level nouvelle cuisine to fun-oriented regional American items. Blue-plate specials were added to the menu. The service staff took off the "heavy duty uniforms" and replaced them with less formal attire. The averge dinner check dropped from $30 to $18 in order to drive volume. Today, as a result of the fine-tuning, sales have tripled and the operation draws from the top 10 to 12 percent of the hotel customer base.

PERSONAL CONNECTION. In an increasingly competitive market, management has become a key tool to generate profits. As a result, it makes economic sense for Radisson, Doubletree and other hotel operators to concentrate efforts on grooming suitable employees.

PHOTO BY MAXWELL MACKENZIE

Gallatin's, in Radisson's Mark Plaza Hotel, Alexandria, VA, has been totally rethought as part of the company's "evolutionary" approach to foodservice concepts.

Alfons Konrad, vice president of food and beverage for Toronto-based Four Seasons Hotels, believes that the strong base of credibility his company has built is possible because of the quality of its employees. "We are firm in our commitment to offer the highest standards to the top end of the business, and because of the great demand our customers place on quality, we place the same demand on our staff," explains Konrad.

Although Four Seasons commands top dollar for room rates and menu prices, Konrad points out that there has been an upswing in prices in hotel and freestanding restaurants in the mid-price market. "When the middle market segment begins to outprice itself, customers look at what they are paying and see that for a few dollars more they can be in a Four Seasons."

Four Seasons is careful to address itself to the needs of this marketplace. For example, The Pavillion in the recently opened Newport Beach property offers a menu highlighting the influence of California cuisine. Spa cuisine is served exclusively at Alternatives restaurant in the Dallas Four Seasons.

MARKETING EMPHASIS. Frank Klare, division vice president of food and beverage for Inter-Continental Hotels Corp., New York, believes that competitive conditions force hotel operators to learn more specifically exactly *who*

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composes the hotel's largest market.

"Today's environment forces us to be better in the jobs we are doing. We need to be more service- and product-oriented," he insists. Klare's concern for detail and Inter-Continental's commitment to the upscale traveler will be put to the test later this month with the opening of the meticulously restored landmark Willard Hotel in Washington, DC, which will be called the Willard Inter-Continental and represents a $73 million investment for the chain. The 395-room hotel features two restaurants, The Willard Room serving American cuisine and wine, and the Cafe Espresso which will offer lighter fare in a cafe setting.

PARING DOWN. With 120 hotels worldwide and 10 domestic properties (three are presently in development in the U.S.), Inter-Continental wants to extend its influence with the upscale frequent individual traveler and the small corporate meeting market. To this end, the chain is currently building smaller, more intimate properties. Similarly, foodservice facilities are pared down as well. "The days of hotels with three restaurants, a bar and an entertainment lounge are over for our market," Klare insists.

Marriott's Courtyard concept has spawned new interest in the moderate price sector. Notes consultant Bell: "Since the Courtyards are developed in clusters and accounting is centralized for three or four properties—as is housekeeping, purchasing, and engineering and overall management—the result is the ability to build a property at $35,000 to $40,000 per room (compared to an industry average of $120,000 to $140,000), charge $45 to $55, and still realize profit ratios of 50 percent and up."

Market-tailored menus, healthy options and personalized service are all important trends.

As profitable alternatives to traditional size hotels, scaled-down versions of full-size properties are less expensive to build and better suited for smaller cities, which are often not as overbuilt as first tier cities.

Hyatt Hotels Corp., Chicago, is involved in a $750 million expansion which calls for 40 small hotels (300-rooms) by 1990. (See *Restaurant Business* July 1, 1986.)

SIMILAR DESIGNS. The Compri Hotel Systems Inc. (Compri Hotels by Doubletree) is a lodging concept with similar designs. A typical Compri Hotel consists of 150 to 225 guest rooms and suites, two to six meeting rooms, pool, whirlpool, exercise room, and a Compri Club (a facility which includes lounging areas, intimate bar, reading area, desks, game tables, and large screen television). Full breakfast and a complimentary cocktail reception are included in the price of a room ($55-$75). Compri manages the low room rate through the elimination of costly facilities including multiple hotel restaurants, lounges, and major convention facilities. Food, except breakfast, is available but not featured.

Dallas-based Park Inns International Inc. is a new system of mid-price hotels offering full service at moderate prices; the system is managed by Brock Hotel Corp., also of Dallas. According to Robert Brock, chairman of Brock Hotel, the Park Inn concept will

Hotel/Motel Market: Foodservice Sales

1984: $10,026,000,000 + 9.4% Sales Growth | 1985: $10,698,000,000 + 6.7% Sales Growth | 1990: $15,470,000,000 + 7.7% Compound Annual Sales Growth

	1984 Sales ($000,000)	1984 Units	1984 Purchases ($000,000)	1984 vs 1983 % Sales Growth	1985 Sales ($000,000)	1985 vs 1984 % Sales Growth	1985 Purchases ($000,000)	1990 Sales ($000,000)	1985-1990 % Compound Annual Sales Growth: Nominal	1985-1990 % Compound Annual Sales Growth: Real
Hotels	8,110	14,968	2,587	11.1	8,748	2,790	7.9	–	–	–
Motor Hotels	726	1,686	233	3.2	741	238	2.1	–	–	–
Motels	1,190	9,131	392	2.7	1,209	398	1.6	–	–	–
Total	10,026	25,785	3,212	9.4	10,698	3,426	6.7	15,470	7.7	3.3

feature a covered courtyard containing a swimming pool, a hot whirlpool, an exercise room, saunas, putting greens, and an atrium cocktail lounge and coffee shop.

ALL-SUITE. Development of all-suite hotels is also on the rise. Currently comprising only two percent of the hotel market, all-suite hotels may soon account for 25 percent of the market according to some analysts.

The suite market provides travelers a selection in all areas from budget to luxury but certain characteristics make this sector one of the lodging industry's fastest-growing areas. The elimination of public areas and non-cost efficient services yields a maximum amount of space for minimum room price.

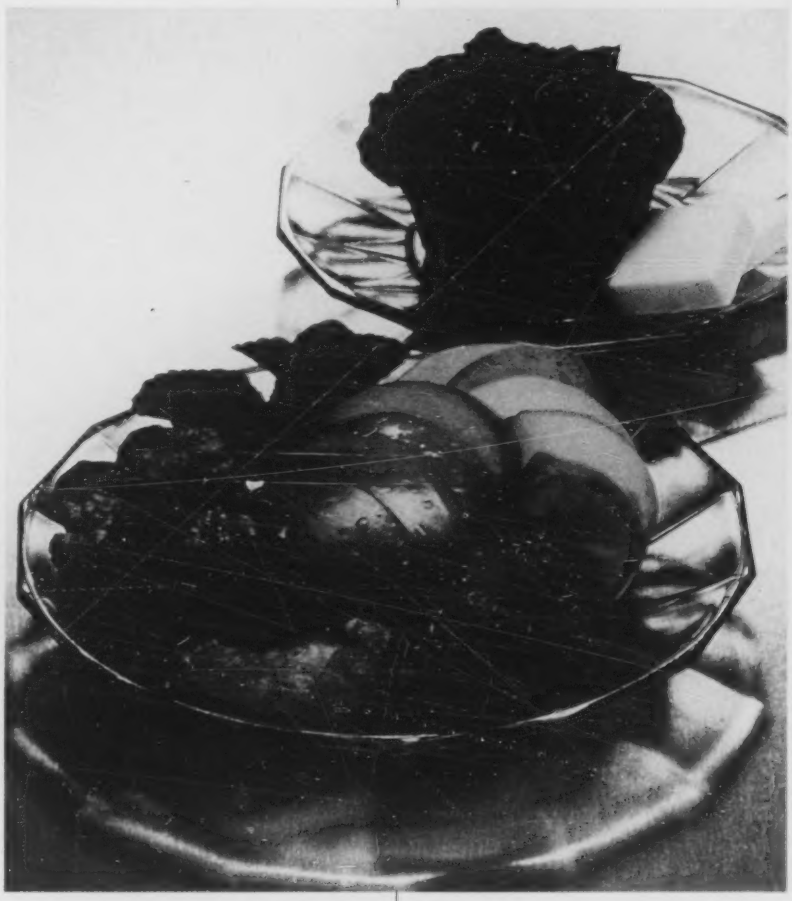
The 1984 acquisition of the all-suite Granada Royale Hometels group by Memphis-based industry giant Holiday Inns Inc. indicates the appeal of the market. Holiday Inns Embassy Suite division leads the all-suite sector with 62 properties in 20 states. Rates range in price (depending on location) from $60 to $130. The idea behind the concept is to provide two rooms at the price of one.

MIXED USE. Embassy Suites recently opened a 261-suite property in the New York metropolitan area as part of the 550-acre Harmon Meadow mixed-use community in Seacaucus, NJ. Owned by the Hartz Mountain Corp., Embassy leases and manages the property. Each suite, which opens onto a landscaped central atrium, consists of a living room, bedroom and bath.

Marriott Corp., Washington, DC, in its bid to be all things to all travelers, is also in the earliest stages of developing a suite division. Marriott Suites should debut by 1990 and will feature a complimentary breakfast, as well as traditional suite amenities such as a large sitting room, kitchen, and separate bedroom.

NEW SITES. The high cost of real estate and new construction has made locations in mixed-use buildings attractive for hotels. For example, the recently opened Hotel Crescent Court is the centerpiece of a mixed-use area developed in Dallas. The 190-room, 28-suite hotel connects the 18-story office towers and the tri-level marketplace of 65 shops and galleries.

A joint venture of Rosewood Properties Inc. and local developer Phillip W. Shepherd, Crescent Court is operated by Rosewood Hotels Inc. The hotel's foodservice facilities draw from well-heeled Dallasites as well as hotel guests. While The Great Hall serves drinks and light meals, The Conservatory is open for breakfast and lunch. However, Beau Nash Restaurant is the hotel's showcase facility.



Doubletree's well-received High Fiber Breakfast Sampler includes freshly squeezed orange juice, a prune bran muffin, stewed prunes, sliced apples, strawberries, apricots and walnuts.

CONVENTION STRENGTH. Jack Vaughn, general manager of Nashville's Opryland, is confident of the strength of the convention-association-trade show market. "We see that end of the business growing steadily," he insists, adding: "Although no segment is recession-proof, we certainly hold up better than most." Opryland's 90 percent occupancy rates testifies to the hotel's strong showing.

"I believe that for hotel foodservice facilities to gain acceptance and remain successful, marketing and merchandising must play key roles. Hotel operators have to let the customer know that the restaurant is there; and do it with pizzazz," Vaughn insists.

Targeting the right market for each hotel's foodservice operation is a key strategy for Omni Hotels (a division of Dunfey Hotels Corp.), insists Walter Staib, vice president of food and beverage for the Hampton, NH-based, 44-property chain. When a hotel is under development Staib and his staff spend time scouting the city trying to determine a void in the local market.

"For example, in Baltimore, we determined that a French bistro—a restaurant with a European flair— would be different, but not so different that it would not be accepted," Staib recalls. As a result, the concept for the 225-seat Jacqueline's was born. " By studying the market we can discover our potential competitor's mistakes. We use these mistakes as benchmarks."

As evidence of this strategy's success, Staib points out that Jacqueline's has met the company's financial expectations since its opening in October, 1985. Today, thanks to the hotel's concerted marketing effort, the restaurant is building a reputation as a serious contender in the local restaurant scene.–**Denise M. Brennan**

THE RETAIL MARKET

Department store foodservice operators are learning how to win customers in a tough market.

The wave of mergers sweeping American industry has made its mark on the retail business as well. The dismantling of the Gimbels chain, the leveraged buyout of the R.H. Macy Co. by its management, and the acquisition of Associated Dry Goods by The May Company are indicative of the consolidation occurring in the retail industry. And, in the fast-growing convenience store segment, units which once concentrated on selling cigarettes, magazines, and juice after midnight are turning to fast food sales to generate sizable margins. In addition, the marriage of fast food concepts with convenience stores has created several hybrid operations.

While this new direction may be healthy for the retail industry in general, it holds special challenges for the foodservice operators within this segment. In 1985, foodservice in the retail market accounted $6.18 billion in sales, a whopping 14.6 percent increase over 1984—an improvement driven almost completely by the convenience food store subsegment.

NEW OWNERSHIP. In the department store subsegment, the takeover of long-standing companies brings in new owners with individual philosophies. As a result there is sure to be careful scrutiny of foodservice operations within department stores, with an especially critical eye cast to the bottom line. Pressure to meet profit goals means that some marginal services may be deleted.

According to Alan Reyburn, operating vice president, restaurant and travel development for Bloomingdale's (a division of Federated Department Stores Inc., Cincinnati), the company insists that foodservice act as a profit center and remains committed to backing "profitable" operations.

Says Reyburn: "Federated does not support losing properties." In addition to enhancing the store's image, Bloomingdale's foodservice facilities must also generate a respectable return per square foot. Reyburn believes that the increased pressure for profit performance by retail foodservice operations industrywide will result in a stepped-up shakeout. "When you measure retail foodservice by return per square foot, it is a losing battle 95 percent of the time," he insists.

PROFITABILITY CONCERNS. This climate has resulted in what Reyburn characterizes as a year of "trial" for those in the retail foodservice segment. He notes: "Most of my associates have enjoyed their company's improving retail sales. But, for foodservice, it has been a tough year."

Neiman Marcus aims to attract a sophisticated customer base with its attention to detail in foodservice.

To plug the drain on his division's P&L statements, Reyburn made an agreement with the principals of three stores to lease out the foodservice outlets in three Bloomingdale's. Of its 32 restaurants (including employee cafeterias), three units are now operated by local independents.

MARKETING. "Marketing is the name of the game today," Reyburn says, explaining the decision. "In New York, we are too far away to determine the personalized marketing techniques necessary to attract that extra party of four per meal period." Reyburn notes that the markets where the three stores are located have intense competition for a small number of patrons. "In all three, my restaurants were up against strong food courts. The courts cut the base for my restaurants by 60 to 65 percent," he points out.

Marshall Fields Co. is a Chicago retailer in the process of taking over and converting five Gimbels stores in Wisconsin, including an anchor at The Grand Avenue Mall, a Rouse Company development in Milwaukee. A total of six new restaurants are being developed for the converted stores and will bring the chain's total to 27 stores and 24 restaurants.

Rod Fensom, manager of creative marketing, foodservice division, believes that "these are exciting times in retail foodservice." He attributes his upbeat outlook to the inherent advantages retail foodservice operators hold over independent restaurateurs. "The merchandise around our outlets offers our customers incentives to come. And, in addition to the built-in customer base of shoppers, sophisticated merchandising techniques are targeted to attract area office workers as well as local residents." For example, he

Retail Market: Foodservice Sales	1984: $5,394,000,000 + 15.0% Sales Growth				1985: $6,184,000,000 + 14.6% Sales Growth					
	1990: $12,554,000,000 + 15.2% Compound Annual Sales Growth									
									1985-1990 % Compound Annual Sales Growth	
	1984 Sales ($000,000)	1984 Units	1984 Purchases ($000,000)	1984 vs 1983 % Sales Growth	1985 Sales ($000,000)	1985 vs 1984 % Sales Growth	1985 Purchases ($000,000)	1990 Sales ($000,000)	Nominal	Real
Department Stores	1,060	4,932	389	5.4	1,050	385	—0.9	1,419	6.2	1.9
Variety & General	299	5,213	108	—2.7	289	104	—3.3	288	—0.1	—4.1
Drug & Proprietary	429	10,468	155	3.1	437	158	1.9	473	1.6	—2.5
Convenience Foodstores	2,552	48,078	880	26.1	3,278	1,131	28.4	8,488	21.0	16.1
Convenience	1,504	33,485	519	29.2	1,987	686	32.1	5,310	21.7	16.8
Gasoline Stations	1,048	14,593	361	21.8	1,291	445	23.2	3,178	19.7	14.9
Other Specialized Retail Stores[1]	1,054	18,693	358	12.6	1,130	384	7.2	1,886	10.8	6.3
Total	5,394	87,384	1,890	15.0	6,184	2,162	14.6	12,554	15.2	10.6

1. Other specialized retail stores include: supermarket chains, independent grocery stores, specialty food shops (such as cheese stores), and miscellaneous retailers such as liquor and book stores.

points out that at the chain's flagship store in Chicago, an on premise bakery turns out baked specialties.

UPPER CRUST. Neiman Marcus continues to appeal to a well-heeled clientele with its 26 restaurants. And, according to Bob Jones, vice president of foodservice for the Dallas-based chain, the newest entry is the "Light Cuisine" concept recently introduced at the Newport Beach, CA, store.

Jones points out that the Light Touches section available on most menus (offering lighter foods and smaller portions) led to the development of a health-oriented concept. Light Cuisine expands the nutrition-oriented slant to embrace a spa-type operation where low-calorie, and salt- and sugar-restricted food is prepared in a "gourmet" style.

Menu items include a curried chicken salad presented in a pineapple shell with papaya and fresh pineapple, and served with banana bread (under 275 calories at $7.50); or a salmon mousse and vegetable terrine (under 350 calories and priced at $8.25). However, for the schizophrenic dieter, there are rich desserts available in "half portions for saints and full portions for sinners."

Walgreen Co. operates 72, 24-hour freestanding Wag's restaurants in the Chicago area and Florida, 24 Wag's restaurants in shopping malls, and 64 other restaurants across the country. The company is trying to position Wag's as independent restaurants: While the original connection with the Walgreen drugstore chain merits Wag's inclusion in the retail segment, the Deerfield, IL-based company is trying to distance itself as much as possible from its drugstore affiliation. Explains John Seastone, vice president of the foodservice division: "Over the last couple of years, we have seen a slowdown in the development of new malls and to stay in business, we needed a new avenue for expansion."

In order to gain market share in a segment dominated by the formidable Denny's, Wag's marketing thrust centers on what Seastone characterizes as "differentiation." He explains: "The decor is upgraded. The menu changes seasonally and an 'appeteasers' section features fun foods. These features are not usually found in traditional coffee shop operations."

Seastone believes that the Wag's menu dovetails with consumer demands for variety and freshness. And, in order to heighten the concept's awareness among the "family" customer base, Wag's places a heavy emphasis on marketing and promotional activities such as specials, new items, and seasonal foods.

GROWTH LEADER. As Wag's seeks to distance itself from its drugstore roots, convenience stores—the growth leaders in the retail market—are busy embracing fast food, solo and in partnerships. (See accompanying story, page 231.)

Indeed, according to the National Association of Convenience Stores (NACA), fast food sales in convenience stores increased to a total of $3 billion in 1985, an increase of $600 million over the previous year. Fast food is particularly appealing to c-store executives due to wide margins, which can run as high as 70 percent for beverages but average a very healthy 45 percent.–**Denise M. Brennan**

THE BUSINESS & INDUSTRY MARKET

In today's competitive marketplace, growth and its attendant change continue to characterize the business and industry (B&I) segment. Over the past several decades the American economy has undergone sweeping changes in structure, moving from a "smokestack" economy—heavy in manufacturing, such as automobiles and steel—to a service economy—characterized by banking and finance, and lighter, high-tech production. Accompanying this change is the emergence of the white collar work force, which now represents the bulk of new jobs. Today's contract caterers are fighting to capture this white collar market, which offers plenty of growth and also tends to be more recession-proof than heavy industry.

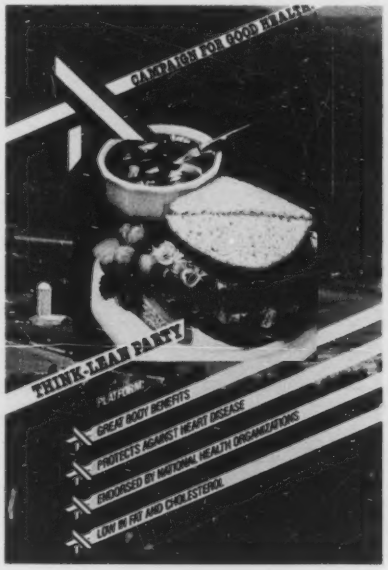
As a result, the B&I feeders have altered their services to appeal to the more upscale, white collar customer and are growing substantially with these new opportunities. In 1985, contract feeding in business offices grew by 7.2 percent, outpacing contract feeding in plants by more than three percentage points. Total sales for the B&I segment grew by 4.6 percent.

LEARNING TO ADAPT. The segment is continually learning how to cater to its customer, who is more sophisticated and generally more knowledgeable about dining out—more quality-conscious and more aware of health and nutrition issues—as well as more willing to try new food items. And the B&I segment has also had the challenge of catering to the American business community's increasing concern with productivity. Foodservice, as well as such "perks" as child care and on-site health clubs are beginning to be viewed as necessities because the end justifies the means: Many employers believe that happy, healthy employees are more productive. However, today's customer is more demanding than ever

This segment is trying to woo diners by copying techniques used successfully in restaurants.

and to keep him on the premises for lunch means competing with the commercial market—a reality that the B&I segment is currently coping with.

B&I operators today have also learned to cope with problems that in the past were endemic to the commercial market, including mergers, acquisitions, and government rulings.



As part of the business community's growing emphasis on productivity, Canteen's "Campaign for Health" offers clients an opportunity to encourage employee awareness of nutrition.

"The trends in B&I are now the same as the commercial market," says Jack Galione, president of New York-based Corporate Food Services Inc., whose projected 1986 sales are $30 million. "With competition so intensive, today's employee has the option to dine in the workplace or to go out to a restaurant," he says.

MERCHANDISING MORE. "Consumers now have higher awareness levels toward unique foods, healthy foods, and quality foods," adds Galione. "To that end, we're now relying on 'small batch' cooking rather than mass production in all of our 44 accounts." Corporate Food Services and other leaders in the segment are discarding the once-traditional cycle menu and are now offering more variety, theme promotions, and extravagant merchandising techniques. Enticing mass food displays, self-service concepts such as salad bars and sundae bars, and trendy food options have helped boost sales in many accounts.

Philadelphia-based ARA Services Inc., a segment leader with 5,000 accounts—including both vending and manual operations—and projected 1986 B&I sales reaching $1 billion, has used new merchandising techniques as well as a commercial approach to successfully build sales. Explains Joe Kingrey, president of Business Dining Services: "When we re-merchandise a unit and concentrate on point-of-purchase materials, signage, banners, food presentation, ARA employee training, and a variety of food offerings, our sales increase an average of 20 percent."

Carts, kiosks, and food bars are a merchandising ploy that has swung into full play at many accounts. Operators are finding that these can offer customers food variety as well as provide flexibility for kitchen staff. An added plus with carts and bars is that they automatically function as eye-catching food displays.

FOOD CARTS. Hallmark Cards Inc., based in Kansas City, MO, discovered the benefits of food carts as an additional foodservice option for employees. The company introduced four food carts—a concept collectively referred to as the Southside Cafe—this past April offering a variety of entrees, desserts, and side dishes. "We wanted the area to be innovative and fun," says Deanna Hormel, director of food services for Hallmark. "We feed up to 200 people a day with the carts and they love the flexibility it provides."

The four carts are pulled out from the kitchen where they are prepared, into the glass-enclosed, atrium-like dining area—with its pleasant setting of trees, sunlight and seats—from 11:00 a.m. to 12:45 p.m. The carts include a salad and fruit cart, an entree cart, a pre-plated salad cart, and a dessert cart.

Average lunch check is $2. "Although it is too early for exact figures, we feel sure that the Southside Cafe has kept our people in the building during lunch," says Hormel.

TAPPING FOOD TRENDS. Memphis-based Dobbs Houses Inc., which has 10 B&I accounts, is catching its patrons' attention with the use of food bars. Says George Alvord, vice president of Dobbs Food Service Management: "Food bars are a creative way to add variety to a unit. You can do just about anything you want with them."

"Color bars"—food bars based on one specific color—are a popular item at Dobbs. The company has already featured a patriotic red, white, and blue bar and an orange bar, which only offer foods of their respective colors.

Riding on the success of commercial food trends has helped boost B&I sales while giving patrons variety. Operators agree that keeping up with what's going on "on the outside" is one very important way to keep employees on

The segment's attempt to adapt commercial trends is nowhere more apparent than in daka's product mix, which is heavily dependent on fast food and portable menu items.

premise for breakfast or lunch.

Chicago-based Canteen Corp. feels that picking up on food trends is the determining factor in its success. "We have hired one person to do nothing but study food trends," says Hal Ritchie, director of food service for Can-

continued on page 158

teen. "As a result, we have been able to pick up on the grazing, ethnic foods, gourmet, breakfast, and carry-out trends. We watch how our commercial competitors merchandise the product and then we incorporate these ideas into our systems."

Although most companies are experimenting with a wide variety of food programs, the three biggest developments to hit the B&I segment have been nutrition, breakfast, and carry-out.

HEALTHY. Consumer awareness of nutrition issues and their desire for light, wholesome foods has had the most impact so far, prompting B&I operators to add a host of new programs, food options, and merchandising techniques. However, operators have found that while people want to have light, nutritious foods available to them, that cannot be the only food option. "People talk light, but they don't always want to eat light—hamburgers and fries are still top sellers," says Phillip Cooke, executive vice president of the Society for Foodservice Management, Louisville, KY.

B&I feeders recognize that they must compete for customers with restaurants and fast feeders.

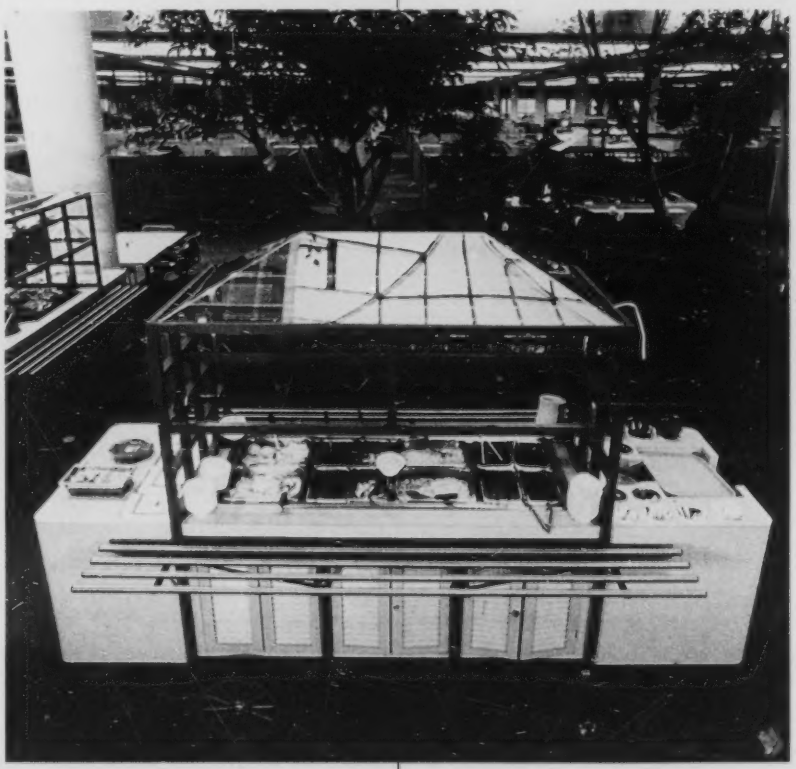
Total programs such as ARA's "Choices," Canteen's "Campaign for Good Health," and Kingston, PA-based Custom Management Corp.'s "Options," give patrons a new variety of healthy menu items daily. "People do a lot of their own diet balancing and they love to have the option to eat a light lunch and then splurge on a dessert," says John Metz, president and CEO of Custom Management, whose total sales exceeded $2 million in 1985.

MORNING FARE. Breakfast is also on the rise in the B&I segment with sales during this daypart increasing up to 20 percent over the past year at some operations. In addition to the traditional bacon and egg dishes, items such as muffins, fruit and yogurt bars, and whole wheat products have become breakfast favorites. However, the majority of operators agree that the biscuit sandwich ranks number one as today's breakfast choice. Wakefield, MA-based daka Inc., which has 200 B&I accounts, reports its breakfast sales have increased 20 percent over the past two years. "I really think commerical chains like McDonald's have paved the way for breakfast," says Terry Vince, president of daka. Canteen's new Bigger Better Biscuit is working overtime for the majority of the company's accounts and is doing it successfully.

TAKE-OUT GROWS. Take-out service has hit the commercial segment hard and as a result it is working its way into the B&I segment. Although take-out's force is not nearly as great in B&I, many operators feel there is plenty of room for growth. "Convenience is a must," says Cooke of the Society for Foodservice Management.

ARA Services led the segment in take-out with the introduction of its Dinner Express program. In selected accounts, ARA patrons can have dinner platters—everything from sandwiches to full-course meals—wrapped and ready to go for at-home dining. "Take-out is a big part of our business and it is going very well," says Kingrey of ARA.

Another company that has been successful with take-out is Canteen. However, unlike ARA, Canteen is not concentrating on dinners, but on desserts. "Almost all of our accounts have a bak-



Hallmark Cards has been enticing patrons with its successful food cart program, offering a variety of entrees, desserts, and side dishes from a group of mobile carts.

1984: $9,601,000,000 + 8.5% Sales Growth **1985: $10,045,000,000 + 4.6% Sales Growth**

1990: $13,335,000,000 + 5.8% Compound Annual Sales Growth

Business And Industry: Foodservice Sales

	1984 Sales ($000,000)	1984 Units	1984 Purchases ($000,000)	1984 vs 1983 % Sales Growth	1985 Sales ($000,000)	1985 Purchases ($000,000)	1985 vs 1984 % Sales Growth	1990 Sales ($000,000)	1985-1990 % Compound Annual Sales Growth: Nominal	1985-1990 % Compound Annual Sales Growth: Real
Contract Feeding In Plants *(cafeteria primarily)*	2,616	N/A	1,177	9.3	2,721	1,224	4.0	3,622	5.9	1.6
Contract Feeding In Business Offices	825	N/A	371	8.1	884	398	7.2	1,254	7.2	2.9
Internal Feeding— Plants & Business	1,630	3,683	763	8.3	1,687	790	3.5	1,972	3.2	—1.0
Waterborne Employees	274	4,656	164	4.6	272	163	—0.7	349	5.1	0.9
Mobile On-Street Catering	588	N/A	195	9.5	637	211	8.3	921	7.6	3.3
Food Vending Machines *(excluding packaged soft drinks & candy)*	3,668	3,088	1,181	8.3	3,844	1,238	4.8	5,217	6.3	2.0
U.S. Defense Personnel	N/A	N/A	1,946	N/A	N/A	1,915	N/A	—	—	—
Food Furnished Foodservice Employees	N/A	N/A	4,074	N/A	N/A	4,102	N/A	—	—	—
Total	9,601	11,427	9,871	8.5	10,045	10,041	4.6	13,335	5.8	1.5

ery which provides our patrons with fresh baked goods two or three days a week for take-out," says Ritchie. "People really like the idea that they can take home cakes, pies, or cookies right from the workplace."

STRAIN OF GROWTH. B&I's attitude toward change has helped boost customer counts and sales, but the sector is also feeling some strains.

Merger and acquisition activity has taken its toll, the biggest being Marriott's acquisition of Saga Corp. Many B&I leaders agree that the outcome of consolidation can both help and hinder the segment. According to Joe Fassler, chief executive officer of Phoenix-based Greyhound Food Management, mergers and acquisitions can help eliminate competition for the white collar dollar because there are fewer players competing for the same clients. "And, as the companies become larger, they can take advantage of volume purchasing. Unfortunately, that will make it easier than ever for the giants to outbid a smaller company," he adds.

CUSTOM TAILOR. In an attempt to keep what business they have, many of the smaller contractors are highlighting their advantage at custom-tailoring to the client's needs. Creative Gourmet Ltd., Boston, is one example of the ability to tailor business to a specific client. The company, which has 28 B&I accounts, evaluates its client and then creates menus, promotions, and merchandising techniques for each location. "We create menus and promotions to fit the general personality of an account," says Lois Yurow, sales and marketing coordinator.

SUBSIDIZED MEAL TAX. Another concern in the segment is the subsidized meal tax; individuals are taxed on their meals if the meal is less than direct cost. This has caused some concern in the B&I segment. "I think it will impact the companies that are not heavily subsidized," says Greyhound's Fassler. "The tax will raise the cost of food and these people will end up leaving the premises. But, to those companies that are heavily subsidized, the perk still outweighs the tax."

Whatever the outcome, with the skills that the B&I segment has developed in merchandising and food quality, and the challenges it has already overcome, segment leaders are hopeful that contract feeders will continue to be able to keep patrons on the premises.– **Cheryl Turi Coutts**

THE HEALTH CARE MARKET

Challenged by financial and demographic changes, the health care segment has adapted with new approaches to the business.

Health care foodservice over the next decade will be affected by several significant—and interrelated—factors: financial retrenchment and segmentation in the health care industry; a growing need for administrators to use foodservice as a marketing tool; and sweeping demographic changes which are creating new niches within the market.

The U.S. health care market last year represented a $430 billion industry, of which $11.5 billion was generated by consumer expenditures in hospital and nursing home foodservice, according to RGI figures.

NEEDING CONTRACTORS. Hospitals have been adversely affected by the implementation of Diagnostic Related Groups (DRGs) the government imposed caps on Medicare payments. The impact of DRGs has been to decrease average hospital stays, making outpatient procedures more popular, and more hospital beds available than ever before. All of this has put pressure on the health care foodservice sector, but it has also created many new opportunities.

Notes Randall Huyser, health care analyst for Montgomery Securities in San Francisco: "As hospital volumes decrease an average of three to four percent annually, it's logical that there's more pressure to keep costs under control. Both hospitals and nursing and retirement homes are faced either with bringing their foodservice in-house to economize, or contracting it out to a major institutional feeder who can do the most efficient job."

Concurs Robert Golden of Technomic Consultants, Bannockburn, IL: "Health care is becoming increasingly segmented and specialized, and hospitals are increasingly utilizing foodservice as a marketing tool. As the trend toward chain and investor-owned hospitals continues to grow, foodservice will become a lot more centralized. And although the chains have a lot of buying power, today's declining hospital occupancy rates have created the need to economize and create efficiencies in foodservice wherever possible."

William "Bill" Edmundson, president of the Healthcare Nutrition Services Division of Philadelphia-based ARA Services Inc., has observed several different changes in hospital foodservice over the past year.

"As costs are becoming more important to survival, administrators are looking toward their cafeterias and restaurants on-property as for-profit centers that they don't have to subsidize," explains Edmundson. "And they're searching for ways to raise their foodservice prices without dropping customer counts."

BOTTOM LINE CONCERNS. Edmundson contends that in most hospital operations, "the foremost concern on the part of administrators is cost, rather than quality" and he points to "dollar savings" as the biggest reason hospitals today look toward the benefits offered by a contracted foodservice situation.

Edmundson calls the smaller, 200- to 500-bed hospital the "bread and butter" accounts of the heathcare foodservice segment because they are large enough to afford outside contractors and yet have some cost controls. ARA's Healthcare Division had sales volume of $200 million in 1985, a figure that continues to grow.

A meal on a silver tray is indicative of how Saga is handling health care foodservice: as a marketing advantage.

Menlo Park, CA-based Saga Corp., also a heavy hitter in the health care feeder segment, services 218 full-service accounts in the segment and is the largest provider of food and nutrition services to major teaching hospitals including Baylor Teaching Hospital in Dallas, Johns Hopkins in Baltimore, Michael Reese Medical Center in Chicago, and the Stanford (CA) Medical Center. Moreover, the recent acquisition of Saga by Marriott Corp. of Washington, DC, should also favorably impact Saga's strength and position in the health care market.

Anthony "Tony" Alibrio, vice president of marketing and sales for Saga's health care division headquartered in Avon, CT, cites a bottom-line attitude which is now prevailing among hospital administrators. "Administrators today function as total business people," he asserts. "As a result of the DRG environment, there's been a change in the direction of the industry. Since cost savings are a primary objective, hospitals look to outside contractors and the savings are substantial."

Health care foodservice by contract can save an operation anywhere between five and 15 percent, as well as reduce food costs by 10 to 20 percent because contract feeders have better purchasing power. Hospital cafeterias, serving both employees and the visiting public, can also expect revenues to increase by five to 25 percent without a price increase as a result of sound contract management.

FOODSERVICE: MARKETING TOOL. With all this expertise being brought to bear on health care foodservice, segment players are capitalizing on their dining programs for all they are worth. Hospitals in particular are viewing foodservice as a way to attract patients *and* as a profit center. Some large medical centers are contracting their kitchens to service smaller locations in neighboring communities, making them a centralized satellite feeder operation. Some have extended their service to include in-home programs such as "Meals on Wheels." Yet others have expanded their foodservice programs to offer on- and off-premise banquet and catering services, to build greater awareness in the surrounding communities and take advantage of the business synergism.

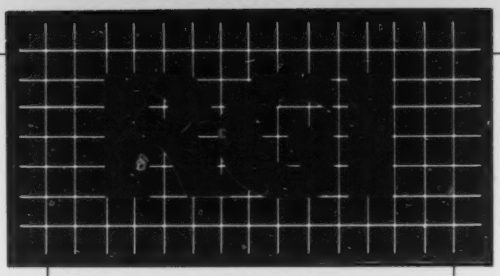
Custom Management Corp., a diversified $185 million foodservice management company based in Kingston, PA, offers gourmet meals, room service menus, and meals to visitors in its health care accounts. John Metz, president and CEO, notes that his clients are more willing to provide the extra service, despite any additional cost, because it becomes a marketing tool for the facility.

The Food Service Department at Los Angeles' Cedars-Sinai Medical Center, headed by Jerome Berkman, is another example of aggressive foodservice marketing.

A Food & Nutrition hotline responds to patient requests, a "Food Boosters" volunteer group researches both patient and public opinion, and a deluxe foodservice option—included in the

continued on page 164

Custom Management (above) and ARA (below) are pursuing a broad base of health care accounts, including both congregate living centers for seniors and more traditional hospitals.



price of a deluxe room or priced at an additional $85 per day with other accommodations—features a restaurant menu with made-to-order meals.

The new FHP Hospital in Fountain Valley, CA, has improved foodservice quality with a 15-minute maximum cooking and delivery time; the menu features such untypical hospital fare as red snapper Veronique and charbroiled lamb chops.

NEW OPPORTUNITIES. As acute care hospitals struggle to contain costs and build business, other opportunities for health care foodservice contractors are emerging. ARA, Custom Management, and other health care feeders are looking toward two other segments of health care foodservice: nursing homes and retirement communities.

The graying of America, with one out of every eight people now over the age of 65, has created two different population segments: one group which needs constant health care in a nursing home environment and another segment of still-healthy, active seniors seeking a comfortable community environment with a variety of services provided, including health care.

Custom Management is actively pursuing accounts in the area of congregate communities for senior citizens, which Metz describes as a market with a great deal of growth potential.

Contract caterers are helping administrators to position foodservice as a marketing tool.

That market poses its own challenges. Says ARA's Edmunson: "People in retirement homes, as opposed to nursing homes, have expectations of a continued comfortable lifestyle and the money to pay for it. The foodservice trend at such facilities is toward restaurant-style menus at these retirement communities, fine dining with waiter or waitress service at lunch and dinner, and buffet set-ups for breakfast."

Although ARA owns or manages 230 nursing homes nationwide, it is in the retirement home arena where dramatic growth is taking place, and ARA has already aggressively been pursuing accounts at communities such as Medford Leas in Medford, NJ; the National Lutheran Home in Rockville, MD; and the new 650-resident Shellpoint Village in Ft. Myers, FL.

DIVERSIFY. A broad-based approach helps. In aggressively pursuing all three subsegments of health care—hospitals, retirement communities, and the nursing home market—Saga has brought in $61 million in new business and 41 new accounts in fiscal 1986, with a 20 percent annual growth in their health care service division.

Although the hospital subsegment is bigger in size and volume for health care feeders, analysts predict that the growth segments over the next decade will be in nursing homes and retirement communities. Health care foodservice of the 1990s and beyond will be catering to a variety of audiences, including employees, staff, patients, general public, and the elderly. Contractors who can operate foodservice as a profit center rather than a cost center have a lucrative market to go after.–**Dolores Long**

Health Care Market: Foodservice Sales

1984: $11,484,000,000 + 2.5% Sales Growth

1985: $11,536,000,000 + 0.4% Sales Growth

1990: $12,415,000,000 + 1.5% Compound Annual Sales Growth

	1984 Sales ($000,000)	1984 Units	1984 Purchases ($000,000)	1984 vs 1983 % Sales Growth	1985 Sales ($000,000)	1985 vs 1984 % Sales Growth	1985 Purchases ($000,000)	1990 Sales ($000,000)	1985-1990 % Compound Annual Sales Growth: Nominal	1985-1990 % Compound Annual Sales Growth: Real
Hospital—Internal	7,391	6,817	3,332	0.2	7,250	3,268	—1.9	6,799	—1.3	—3.6
Hospital/Nursing Home—Contract	1,106	*[1]	442	7.0	1,180	472	6.7	1,618	6.5	4.0
Other Institutions—Internal *(for specialized care including nursing and old age homes, orphanages, etc.)*	2,987	26,169	1,835	4.9	3,106	1,908	4.0	3,998	5.2	2.7
Total	11,484	32,986	5,609	2.5	11,536	5,648	0.4	12,415	1.5	—0.9

1. Contract units are included in the totals for Hospital-Internal and Other Institutions.

THE STUDENT MARKET

Declining college enrollments are forcing operators to seek new avenues for growth.

The student segment, like so many sectors in the industry, is learning to respond to new pressures, brought on by changes in the economy and in the social and demographic structure of the country.

In particular, enrollments in traditional four-year colleges are declining, although ever so slightly, prompting many college foodservice operators to fear that growth is limited in this, the largest, component of the segment.

NEW NICHES. Nonetheless, there are other areas of the student market that are worthy of contract feeders' attention, including two-year colleges, technical and night schools, and elementary and secondary schools. The question is whether these sub-markets will adequately fill the void.

This year, enrollments in four-year colleges are projected to be 12,150,000, down from 1983 when enrollments reached an all-time high of 12,465,000, according to the Washington, DC-based Educational Information Office, a division of the United States Department of Education. "We're projecting two-year colleges to hold steady over the next couple of years while four-year colleges will experience a decrease," says Vance Grant, specialist in education statistics at the Education Information Office.

Daniel Krpan, vice president, sales and marketing of Chicago-based Canteen Corp., echoes Grant: "The campus marketplace is not growing. Sales at four-year institutions will remain flat because there are fewer college-age students. There are more mature people going to school at night, after classes they're tired and just go home."

Canteen's Eat Right program gets elementary school students to eat nutritiously, a pattern the company can continue to serve as the youngsters reach college age.

COMMERCIAL TRENDS. Nonetheless, educational foodservice operators are aggressively going after the student market, and in doing so, are making concerted efforts to please students by keeping in step with overall trends in the commercial sector.

As evident industrywide, food courts and food boutiques are increasingly popular ways to offer the whole menu gamut from pizza to nachos to hamburgers and fries. "There is a definite movement toward more commercial-like, retail marketplace concepts where students are given the opportunity to choose from a variety of foods," says Mike Roueche, director of marketing services, foodservice management, for Marriott Corp., based in Washington, DC. Roueche illustrates this trend with Marriott's "HB Quicks," a fast food concept offering items such as roast beef sandwiches, hamburgers and fries, and pizza.

In fact, it's been a busy year all around for Marriott with the acquisition of Menlo Park, CA-based Saga Corp. Yet, while there is still no clue of how this new giant will change the complexion of student foodservice—as a result of the acquisition Marriott is now the largest provider of food services—competitors insist they're not threatened. Marriott reported $1.6 billion in sales last year for its contract foodservice division, including toll road restaurants, in-flight catering, and 75 educational accounts.

HEALTHY APPROACH. While there seems to be an emergence of free-standing pizza, hamburger, and hot dog establishments—such as Little Caesars and Burger King—on college campuses, emphasis on nutrition has not waned either: "We are demanding freedom of choice and are simultaneously demanding nutrition," says

Student Market: Foodservice Sales	1984: $8,194,000,000 + 5.5% Sales Growth				1985: $8,508,000,000 + 3.8% Sales Growth			1990: $10,014,000,000 + 3.3% Compound Annual Sales Growth		
	1984 Sales ($000,000)	1984 Units	1984 Purchases ($000,000)	1984 vs 1983 % Sales Growth	1985 Sales ($000,000)	1985 Purchases ($000,000)	1985 vs 1984 % Sales Growth	1990 Sales ($000,000)	1985-1990 % Compound Annual Sales Growth: Nominal	1985-1990 % Compound Annual Sales Growth: Real
School—Internal (public, parochial, elementary & secondary)[1]	2,780	90,812	3,010	7.9	2,908	2,977	4.6	3,383	3.1	—1.1
School—Contract	833	*[2]	324	9.3	887	327	6.5	1,175	5.8	1.5
Colleges, Universities — Internal	2,969	2,641	1,329	1.3	2,990	1,265	0.7	3,140	1.0	—3.1
Colleges, Universities— Contract	1,612	*[3]	516	7.9	1,723	527	6.9	2,316	6.1	1.8
Total	8,194	93,453	5,179	5.5	8,508	5,096	3.8	10,014	3.3	—0.9

1. Actual cash receipts from children.
2. Total unit count is given in the Internal total.
3. Not including $840,181,940 worth of commodities and milk, a -1.6% decrease from 1983.

Krpan of Canteen. Thus, Canteen sponsors health-oriented programs playing up nutritious foods with table tents and trivia games as part of a Nutrition Awareness Health Fair.

BREAKFAST. Special attention is also being given to the breakfast daypart with operators creating nutrition-packed cereal bars offering whole grains such as bran, and fresh fruit and yogurt. And, these daypart service hours have been expanded.

In line with the national trend toward nutrition, there is evidence of less red meat in the student market—with one exception. Hamburgers and fries are still selling as well as they ever sold," says Harris "Bud" Rusitzsky, president of Rochester, NY-based Serv-Rite Corp., which currently has over 30 educational accounts in 44 operational units.

Concepts that are especially vogue in the student market today are those that emphasize portability, speed of service, and convenience.

Cornell University Dining Services, the internal foodservice operator for Cornell University in Ithaca, NY, has responded to this by starting up on-campus convenience stores where, aside from shopping for groceries, students can opt to sit down for a quick meal or take-out at the bakery and deli. "We offer a full deli line as well as hot items," says Margaret Lacey, director, Cornell University Dining Services, "and beginning this semester we'll do home delivery."

It's safe to say that many of the trends taking shape today stem from an older college population, a group which expects to be treated more like adults than kids away from home for the first time. More evidence of this can be found in the introduction of foodservice credit cards.

ADULT SERVICES. Memphis, TN-based Dobbs Food Service Management, part of Dobbs Houses Inc., offers a "Dobbs Card," a credit card meal plan service to students, as an option to the traditional all-you-can-eat meal plans. "Demographics show that college students are getting older, with the average age of 21 at many of our universities, and the Dobbs Card is in step with this trend," says George Alvord, vice president and general manager of Dobbs Food Service Management.

Dobbs is new in the student foodservice arena and currently has 30 educational accounts, the largest being East Tennessee State University with 10,000 students. Sales reached $10 million last year, including Dobbs' 10 business and industry accounts.

CREDIT CARDS. Serv-Rite also recently introduced the credit card system. Says Rusitzsky: "The system works just like a consumer credit card with the only difference being the money is paid in advance. We've seen an overall 10 to 12 percent increase in sales because of the credit system."

Meanwhile, as college enrollments decline, secondary schools post healthy enrollments. This year there are projected to be 39.6 million students enrolled in kindergarten through twelfth grades, up from 39.4 million last year and 39.3 million the year before. This trend is expected to continue to rise as baby boomers continue to begin having families.

CHALLENGES. Foodservice operators have less flexibility in creating menus for these markets primarily because most elementary schools must comply wth United States Department of Agriculture (USDA) standards which stipulate nutritional balance.

This, coupled with the fact that school lunch programs have been severely affected by Reagan administration cuts, makes the secondary and elementary school markets that much more challenging. Says Canteen's Krpan: "The whole emphasis of the Reagan program was to make more money available for the bottom end of the income spectrum for families. What happened is students at middle income brackets and upper income brackets have been eliminated from the program, but it has not reduced participation. You now have more students on the free program and fewer on the partially subsidized one."

Nutrition is a company landmark at Philadelphia-based ARA Services, Inc.: "The nutrition aspect is our big concern," says Elizabeth Jones, vice president controller of school nutrition services. "We're getting more advanced with merchandising nutrition with banners and hand outs and are focusing attention on our Rainbow Program which basically color codes the four basic food groups to encourage students to eat healthier." ARA currently has 180 school and 250 college and university accounts.–**Laurie Bain**

THE LEISURE MARKET

Americans' desire to travel—and to stay in the U.S. to do it—is good news for the leisure segment.

The situation for the leisure segment of the foodservice industry looks especially good right now. Partly because more Americans are vacationing in the U.S. this year—the result of low gasoline prices and fear of terrorism abroad—operators in the leisure segment are reporting healthy sales and increased attendance at attractions. The inclination of Americans to visit theme parks, sporting events, museums and theaters is also helped by the fact that many customers continue to allot a fair share of their disposable dollars for leisure.

In fact, segment players feel that 1986 will be a better year by a good margin, outperforming 1985's relatively moderate five percent growth. This would be welcome news indeed: According to RGI figures, growth has been mired at this level since 1983.

GOOD ATTENDANCE. "Attendance has been very good and sales have been good as a result," says Sheldon Silver, director of marketing services for Chicago-based Canteen Corp., whose recreation and leisure subsidiaries include both TW Services and Volume Services.

One of the major trends in the segment is a gradual upgrading in foodservice, with leisure segment concessionnaires responding to customers' desires for more variety and for fresh, healthy foods. For example, the Sesame Place children's theme park in Langhorn, PA, offers kiosks serving fresh-squeezed orange juice and lemonade as well as pizza with whole wheat crust and sandwiches and hot dogs served on whole wheat buns. A snack bar offers freshly cut raw vegetables.

CONSOLIDATION. Since Canteen's merger earlier this year with Interstate United Corp., the accounts of Interstate's Volume Services recreation division have been combined with Canteen's TW Services recreation arm; TW Services now focuses on accounts in national and state parks while Volume Services concentrates on sports and convention facilities.

The merger makes Canteen Corp. one of the largest operators in the leisure segment, with more than 100 accounts ranging from Yankee Stadium in New York City to Yellowstone National Park in Wyoming. Included under the TW Services and Volume Services banners are food outlets at major league ballparks, college stadiums, theme parks and race tracks, as well as resort lodges and even horseback rental stables.

Besides benefiting from an increase in domestic travel, a relatively healthy economy, and good weather, the leisure segment of the foodservice industry may also be benefiting from America's renewed fascination with families and children. "I do believe that we're entering a cycle when 'family entertainment' is in style again," says Sam Gifford, vice president of corporate communications for Rochester-based Delaware North Corp., whose subsidiary Sportservice Corp. operates foodservice concessions at 210 arenas, ballparks, and parks around the country.

UPGRADING. Because the leisure segment encompasses such a broad range of activities—from theme parks to museums to movie theaters—it is hard to generalize about specific trends and activities in the segment. In

Sportservice, a subsidiary of Delaware North Corp., operates dog tracks, such as this one in West Memphis, AR, with its upscale Visual Impressions dining facility.

1984: $4,737,000,000 + 5.1% Sales Growth | 1985: $4,975,000,000 + 5.0% Sales Growth

1990: $6,847,000,000 + 6.6% Compound Annual Sales Growth

Leisure Market: Foodservice Sales

	1984 Sales ($000,000)	1984 Units	1984 Purchases ($000,000)	1984 vs 1983 % Sales Growth	1985 Sales ($000,000)	1985 Purchases ($000,000)	1985 vs 1984 % Sales Growth	1990 Sales ($000,000)	1985-1990 % Compound Annual Sales Growth: Nominal	1985-1990 % Compound Annual Sales Growth: Real
Theme Parks, Arenas, Stadiums & Tracks	2,200	N/A	763	5.4	2,334	809	6.1	3,295	7.1	2.8
Drive-In Movie Theaters	245	2,785	76	5.5	250	78	2.2	331	5.8	1.5
Bowling Lanes	702	3,933	253	3.7	726	262	3.5	870	3.7	—0.5
Summer Camps & Hunting Facilities	124	2,806	74	3.7	124	74	0.2	155	4.6	2.2
Clubs	1,466	10,310	614	5.4	1,541	645	5.1	2,196	7.3	3.0
Total	4,737	19,834	1,780	5.1	4,975	1,868	5.0	6,847	6.6	2.3

fact, at many parks and stadiums foodservice does not change from season to season. Customers want hot dogs, soft drinks, and beer, and that's what they get, year after year.

Some of the more innovative operators, however, continue to upgrade their offerings. At museums particularly, foodservice can be very trendy and stylish. Even at sports stadiums, customers can expect some surprises.

"The whole industry is getting more creative," says Delaware North's Gifford. At Sportservice, he says, an executive chef is constantly reviewing menus. At Chicago's Kaminsky Park, where the White Sox play, Sportservice customers can choose from bratwurst and shaved steak sandwiches as well as from hot dogs and popcorn. The company recently added Chicago's lakeside recreation area, Grant Park, as an account, and one addition to the limited foodservice menu will be a broad variety of ice cream flavors.

SELF-SERVICE. A serve-yourself beer outlet called The Bud Hut recently opened at Detroit's Joe Lewis Arena, operated by Olympia Arenas Inc.(OAI), a subsidiary of Farmington Hills, MI-based Little Caesar Enterprises Inc. Customers line up to receive cups, then pass through a turnstile one at a time to fill the cups from a series of spigots inside the eye-catching black, white, and red kiosk.

Joe Lewis Arena is the first major sports arena to have all its beer piped from a central location, adds Brendy Barr, OAI's director of public relations and publicity. Thousands of feet of pipe snake through the arena from a storage area in the basement, so beer stands never run out of beer.

OAI is also involved in the continuing creation of a festive "food mart" at the arena, with a series of colorful kiosks selling everything from Mexican food to fresh fruit and yogurt. The most popular concessions are two Little Caesars pizza outlets and the Bud Hut, adds Barr.

ALCOHOL CHALLENGES. Alcohol awareness continues to be a major issue to leisure foodservice operators who serve beer at sports events. Last year, Delaware North's Sportservice subsidiary initiated a major program to monitor alcohol consumption among customers at its sports arenas and to publicize the dangers of drinking and driving.

"Our alcohol awareness program is still in place and we're continuing to refine it," says Delaware North's Gifford. "We've had no major incidents, but we're not counting our chickens yet."

Attendance at theme parks is running very strong. At Walt Disney World in Orlando, FL, attendance has been increasing at a rate of about six percent a year, with over 23 million people visiting the sprawling park in 1985. Disney spokeswoman Sarona Soughers attributes 1986's strong season to a decrease in international travel, lower air fares, and lower gas prices.

A STRONG SEASON. Soughers says she expects attendance to continue strong because Walt Disney World is beginning a 15th birthday celebration in October. Prizes will be given away every 15 seconds, with a car awarded to a park guest every day for a year.

Walt Disney World offers a full range of foodservice, from quick burgers to fine dining restaurants. However, the park's most elegant facility, the Lake Buena Vista Club, recently was downscaled to please guests seeking a casual experience. "We're serving steak instead of veal cordon bleu," notes Soughers.

The park's newest restaurant is The Living Seas, serving fresh seafood flown in every day from Boston. Opened in January, the restaurant is dominated by three, huge plexiglass windows that look into a six million-gallon aquarium.

DIVERSIFICATION. On the drawing board at Disney World are the Soundstage Restaurant and the Studio Tour Restaurant, both part of a new $300 million, 100-acre Disney-MGM Studio and Studio Tour, for which ground was broken this summer. The three-year project, when completed, will be the fourth major entertainment center at Disney World, which already features the Magic Kingdom, Epcot Center, and the Walt Disney World Village. The new attraction is a working film and television facility integrated with a walking and tram tour.

At least one caterer active in other segments of the foodservice industry says that the relative stability of the leisure segment makes it attractive as a diversification vehicle to caterers active in other segments of the foodservice industry.

Phoenix, AZ-based Greyhound Food Management Inc. started as a transportation caterer and has since expanded into several other areas. Today, the company operates several leisure accounts, including the Denver Art Museum, the San Francisco Opera House, and seven major lodges at Montana's Glacier National Park that gross $7 million in 100 days during the short summer season. Leisure accounts make up only five percent of GFM's business, but president Joseph Fassler hopes to see that change.–**Jacque White Kochak**

THE TRANSPORTATION MARKET

Americans have been satisfying their taste for travel in ever-increasing numbers, and as a result operators in the transportation sector of the foodservice industry report steadily growing sales. According to RGI data, the foodservice sales in the segment grew by a healthy 9.7 percent in 1985, driven by the performance of the highway subsegment.

SEGMENT IN FLUX. The segment, however, is very much in flux, largely the result of deregulation, changes in the value of the dollar abroad and in fuel prices, and ongoing shifts in Americans' travel patterns. Airline caterers in particular are bracing themselves for turmoil as major airline companies, weakened by intense competition as a result of deregulation, merge with other carriers. A number of airlines are now caught up in acquisition proceedings.

Despite the upheaval in the airline industry, Americans *do* like to travel. Travelers spent $269 billion dollars in the U.S. in 1985, a significant 14 percent increase over 1984. Of that total, $76 billion went for food, compared with $54 billion in 1984, according to the U.S. Travel Data Center.

Americans are satisfying their urge to travel, making the transportation segment healthy.

Travel to Europe, meanwhile, has been off because of fears about terrorism, although some operators are confident that the worst is perhaps over. "We certainly lost some international travel," says John Tippets, vice president of marketing for airlines at Sky Chefs, Arlington, TX, one of the country's three largest airline caterers. "The second quarter was softer than we would have hoped, but the third quarter is looking better."

SEE AMERICA FIRST. Tippets notes that fears of terrorism are not the only thing keeping travelers in the States. The dollar's reduced value internationally has made Europe seem less of a bargain than in the past. But, apparently, Americans are *not* staying at home: Airline caterers and terminal concessionnaires have benefited from a 12.2 percent increase in airline passenger traffic in 1985, spurred by the introduction of 30-day advance supersaver fares introduced in early 1985.

The country's big three airline caterers—Marriott, Sky Chefs, and Dobbs International—all report "business as usual" at this point.

At the end of 1985, Marriott Corp.'s in-flight catering division, based in Washington, DC, operated 61 flight kitchens at 39 airports as well as 29 at 26 foreign airports servicing more than 150 airlines. The company recently signed an agreement with Canadian Pacific Airline to acquire its five Chateau Kitchens, representing Marriott's first catering operations in Canada.

MENU

Beluga Caviar
Wild Scotch Smoked Salmon
Foie Gras of Goose

Salad in Season

Roast Tenderloin of Beef
Roasted Mediterranean Monkfish
Chicken Provencal

A Tasting of Cheeses

A Selection of Gateaux and Fruit

Three-star Roger Verge (center) with his collaborators on menu for Pan Am's Nice to New York flight (l. to r.): cheese-makers Edouard and Robert Ceneri, menu designer Roger Muhl, and patissier Jacques Fourmont. The menu is excerpted above, right.

1984: $2,528,000,000 + 9.4% Sales Growth | 1985: $2,774,000,000 + 9.7% Sales Growth

Transportation Market: Foodservice Sales

1990: $4,432,000,000 + 9.8% Compound Annual Sales Growth

	1984 Sales ($000,000)	1984 Units	1984 Purchases ($000,000)	1984 vs 1983 % Sales Growth	1985 Sales ($000,000)	1985 Purchases ($000,000)	1985 vs 1984 % Sales Growth	1990 Sales ($000,000)	1985-1990 % Compound Annual Sales Growth: Nominal	1985-1990 % Compound Annual Sales Growth: Real
Air & Rail *(in transit)*	1,338	97	652	9.1	1,461	712	9.2	2,461	11.0	6.5
Terminal Facilities	649	269	227	7.5	702	246	8.2	1,025	7.9	3.5
Highway *(interstate)*	368	N/A	130	12.3	420	148	14.1	663	9.6	5.1
Passenger & Cargo Ships	173	57	95	12.8	191	105	10.5	283	8.2	5.6
Total	2,528	423	1,104	9.4	2,774	1,211	9.7	4,432	9.8	5.5

The big news from Sky Chefs, which operates 33 domestic flight kitchens and is building a 34th in Nashville, is the company's new independence from AMR Corp., whose principal subsidiary is American Airlines. The company has been sold to a group of investors dominated by Toronto-based Onex Corp., a diversified industrial company, and is now free to aggressively pursue relationships with airlines other than American.

Memphis-based Dobbs International Services Inc., a subsidiary of conglomerate Carson Pirie Scott & Co., operates 52 flight kitchens at 41 domestic and four foreign airports. The company recently signed a letter of intent with SAS Service Partners, a subsidiary of the Scandinavian Airline System, to form a joint foodservice venture at Chicago's O'Hare Airport.

The company also is opening a new kitchen in Greensboro, NC, in October and is planning major expansion in both Dallas and Cincinnati. The company spent some $13 million last year to purchase new catering kitchens, refurbish or expand existing units, and upgrade equipment.

MARKETING TOOL. The beleaguered airlines are beginning to view amenities like foodservice as a marketing tool to woo customers from competitors. For example, Pan Am's newest shuttle flights offer services such as on-ground ticketing, assigned seating and snack service. In response, Eastern, which shuttles approximately three million people a year between New York, Boston and Washington, is considering adding foodservice.

Pan Am recently began serving a new menu to first class customers on its flagship route between Nice, France and New York. The food is prepared in the Le Ciel D'Azur restaurant at the Nice Airport under the direction of chef Michael Bezard and is inspired by the "Cuisine of the Sun" of three-star Roger Verge, chef/owner Le Moulin de Mougins and l'Amandier in Mougins near Cannes. Verge and his three-star colleagues Pierre Troisgros and Paul Bocuse serve as consultants.

The same quality of food, without the first class trimmings, is served to coach-class customers, says consultant Michael Buller, who put the menu together. What is surprising, he says, is that this meal does not cost any more than typical Pan Am first class service, thanks to careful shopping.

TRAINS. On the ground, Amtrak also has been using foodservice as a marketing tool, and recently began including the price of meals in the first class fare. As a result, first class ridership has increased significantly; last year, first class was running at 60 percent capacity, and this year at 90 percent capacity, says Henry Kabel, foodservice director for Washington, DC-based Amtrak. Amtrak is upgrading snack service by expanding its "Picnic in a Basket" program, which offers sandwiches with accompaniments.

BUS LINES. Bus lines have not been sharing in the transportation boom. Since bus transportation was deregulated many small independent buslines have appeared, hurting the major carriers. Also, very low airfares have made the price of traveling by air almost as cheap as traveling by bus.

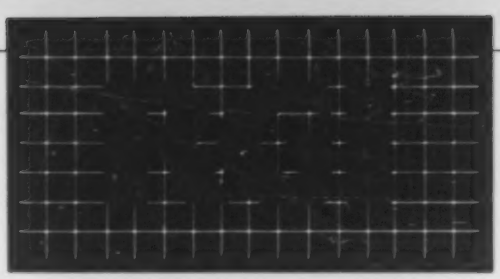
As a result, says Jospeh Fassler, president of Greyhound Food Management Inc. in Phoenix, the company's bus terminal business has dropped 20 percent from last year, on top of a 15 percent decrease from the year before. Five years ago, he says, bus stop sales contributed 50 percent of GFM's total sales; today bus stops account for less than 15 percent of sales.

In response, GFM is wooing charter bus services, hoping to interest them in stopping for meals at the company's many bus station and highway outlets, primarily subleased Post House and Burger King outlets. The company is also eyeing airports, and already operates foodservice outlets at Chicago's O'Hare and at Burbank (CA) airports.

TRUCKERS. GFM also is courting a different kind of traveler: truckers along the interstate highways. The company operates eight truck stop complexes in Pennsylvania, Ohio, Texas, Missouri, Kansas, California, and Oklahoma and plans to open three or four more in 1987. These truck stops generate $10 to $15 million in sales a year.

While GFM is decreasing emphasis on bus terminal foodservice, Dave Laughlin, president, Trailways Food Services Inc., Dallas, remains optimistic about bus travel. The company may open more Church's or Hardee's franchises in bus terminals; presently, Trailways runs three Hardee's and one Church's as well as about 23 small Refreshment Center U.S.A. outlets offering a limited microwavable menu.

Well-known fast food companies continue their march along the nation's toll roads. When Marriott acquired Howard Johnson last November, the company quadrupled its number of units along the country's turnpikes and now has units scattered from Maine to Oklahoma. Marriott is continuing to convert its 22 existing Marriott Foodservice units into a concept combining Big Boys and Roy Rogers. Of the 68 new units acquired from HoJo, a significant number have already been converted to Burger Kings, Popeyes, and Dunkin' Donuts.– **Jacque White Kochak**



19th Annual Restaurant Growth Index

The foodservice industry is in a constant state of change. Every year, competition intensifies, more kinds of foodservice establishments open their doors, new menu items become popular, and the customer base gets a little more sophisticated. To stay in business, the foodservice operator has to be a little sharper too, every year.

As a research tool, the Restaurant Growth Index (RGI) has also changed with the times. Over the years, we've added new data, changed the techniques used to measure growth potential, and made the statistical information that follows more easy to understand. This year, we've presented all of the information in a format that's easier to read and more consistent.

As in previous years, the heart of this statistical information is the Restaurant Activity Index (RAI), which indicates the propensity for customers in each of 317 metropolitan areas and 214 ADIs (Area of Dominant Influence of a TV station) to patronize restaurants, and the Restaurant Growth Index (RGI) itself, an index indicating how well the supply of restaurants meets the demand for dining out in each area.

Both these tools, in addition to the total information presented in the following detailed tables, can be viewed as a way to approach market research. Whether you are evaluating your own location for potential growth or evaluating new territory for expansion, what follows is the data and estimates you need for planning purposes.

The following information is presented in tabular form:

- Definitions of 317 Metropolitan Statistical Areas (MSAs), pages 182 through 186.
- RGI Regional Summary, page 188.
- Sales by Metropolitan Area (RGI Metro Report), pages 190 through 212.

The RGI is a valuable tool for market research, either in analyzing an existing location or evaluating for future expansion.

- Sales by Area of Dominant Influence (ADI Report), pages 212 through 220.
- Top 100 Eating Place Markets (by Metro Area and ADI), page 222.
- Top 100 Fast Food Markets (by Metro Area and ADI), page 223.
- Top 100 Restaurant Markets (by Metro Area and ADI), page 224.
- Top 100 Per Capita Eating Place Markets (by Metro Area and ADI), page 225.
- Top 100 Per Capita Fast Food Markets (by Metro Area and ADI), page 226.
- Top 100 Per Capita Restaurant Markets (by Metro Area and ADI), page 227.
- Top 100 RAI Markets (by Metro Area and ADI), page 228.
- Top 100 RGI Markets (by Metro Area and ADI), page 229.

In addition, information concerning the population, average household size, sales, number of units, and market share is contained within the Metro and ADI Reports.

DEFINITIONS

POPULATION. Updated from the 1980 U.S. Census of Population and Housing, it is an estimate of the number of people living in an area at the end of the year. It includes people living in colleges and hospitals, and armed forces permanently assigned to the area, but excludes tourists and transients. Large changes in group-quarters populations are not projected in these forecasts.

Demographic statistics have been estimated employing a population component procedure. That is, independent county estimates of births, mortality, and migration are generated. These population components are aggregated and either added or subtracted from the appropriate benchmark.

Fertility rates, for example, have been projected at their current rate of change. We assume that the pattern of births will continue its slow but steady rate. Similarly, we have assumed that no major medical advancement will be found over the next few years and that the mortality rates that are in effect today will continue unmodified.

PERCENT OF U.S. POP. A market's share of the total U.S. population.

HOUSEHOLD. A household consists of all the people occupying a single housing unit under 1980 census rules—such as a house, an apartment, a group of rooms, or a single room. The members of a household need not be related, and a single person living alone in a housing unit is also counted as a household.

All persons who are not members of households are regarded as living in group quarters: institutions, college dormitories, military barracks, etc. Caution: Although a county's population total will include all the people in the area, the household total will not do so because it excludes those living in group quarters.

AVERAGE HOUSEHOLD SIZE. Total population divided by the number of households. Depending upon whether it is above or below the U.S. average, it is used as a rough indicator of the relative importance of family-type units or single-person units in a local area.

However, the figure can be artificially high in those relatively few counties where there is a disproportionate share of college, military, or other types of institutional population. The people living in such groups are part of the population total, but their dwellings are not part of the household total. Thus the disparity in these figures.

EATING AND DRINKING PLACES. Includes establishments selling prepared foods and drinks for consumption on or near the premises or for take-out, as well as lunch counters and refreshment stands selling prepared foods and drinks for immediate food contractor, as well as leased eating and/or drinking concessions in theaters, hotels, amusement parks, etc. Restaurants and lunch counters operated by department stores are classified in the General Merchandise Group; those operated by hotels are classified in the Hotels Group.

EATING PLACES. Includes retail sales and units of restaurants and lunch rooms, social cafeterias, fast food sales, contract feeding, and ice cream and frozen custard stands. Excludes drinking place sales and units.

RESTAURANTS. Establishments engaged in serving prepared food and beverages selected by the patron from a full menu. Waiter or waitress service is provided and the establishment has seating facilities for at least 15 patrons. These establishments often serve alcoholic beverages.

Establishments in which sales of alcoholic beverages for consumption on the premises exceed receipts from sales of prepared foods and nonalcoholic beverages are classified as "drinking places."

FAST FOOD. Establishments primarily selling limited lines of refreshments and prepared food items. Included in this group are establishments which prepare refreshment items such as pizza, barbecued chicken, and hamburgers for consumption either on or near the premises or for "take-home" comsumption.

MARKET SHARE. Represents the percent of eating places from fast food units or from restaurants. It is indicative of customer preference of these types of establishments in that area.

RESTAURANT ACTIVITY INDEX (RAI). The percent of U.S. eating place sales divided by the percent of U.S. food store sales, expressed as an index. An

continued on page 178

FOOTNOTE TO SALES FIGURES

Adjustment of eating place sales figures to be comparable to Current Retail Trade Reports.

After adjustments for differences in what Current Retail Trade includes in eating places and for what we exclude (all sales that are not included in meals and snacks and alcoholic beverages, and the total sales of all establishments that do not have a payroll), the 1985 data for eating places as presented in the forecast and analysis section rises from $111,131,000,000 to $124,424,000,000.

The components of adjustment are:

1. Non-payroll establishments—Knapp includes only establishments with payrolls. Adjusting for non-payroll establishments adds $2,430,000,000

2. Merchandise line—Knapp includes only sales of food (meals and snacks and nonalcoholic beverages) and alcoholic beverages. Adjusting to total sales adds $1,365,000,000.

3. Contract feeders—Knapp does not include contract feeders in eating places as Current Retail Trade Reports does; but shows sales in the segment they serve. Adjusting for the inclusion of contract feeders adds $9,498,000,000, a figure higher than the Census.

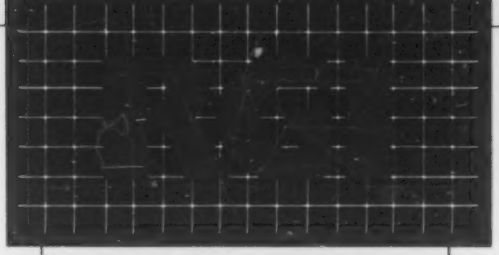
Adjustment of drinking places sales figures to be comparable to Current Retail Trade Reports.

1. Non-payroll establishments—Knapp includes only establishments with payrolls. Adjusting for non-payroll establishments adds $948,000,000.

2. Merchandise line—Knapp includes only sales of food (meals and snacks and nonalcoholic beverages) and alcoholic beverages. Adjusting to total sales adds $758,000,000.

The adjusted drinking places sales figure goes from $8,238,000,000 to $9,944,000,000.

The adjusted eating and drinking place sales figures go from $119,369,000 to $134,368,000,000.



index greater than 100 indicates a more than average propensity to eat out rather than at home.

RESTAURANT GROWTH INDEX (RGI). The RGI is designed to show the relationship between restaurant supply and demand in each market as an index. When supply equals demand, the index is 100. When demand exceeds supply, and the potential for growth is present, the index will exceed 100. The amount by which the RGI exceeds 100 represents the proportion of growth potential that is present—an index of 120 means that the market's demand could support 20 percent growth. When the market is saturated, and supply exceeds demand, the index will drop below 100.

Demand is measured by six factors:

- Market's share of U.S. employed persons.
- Market's share of U.S. working women.
- Market's share of U.S. households with effective buying income of $25,000 or more.
- Market's share of U.S. eating place sales.
- Market's share of U.S. hotel and motel receipts.
- Market's share of U.S. population age 14 & under; 25 to 44.

These factors are given equal weight and added together to create the demand portion of the equation (i.e., A+B+C+D+E+F divided by 6).

Supply is measured by the percentage of U.S. total eating places located in the market.

The RGI is created by dividing demand by supply, and multiplying the result by 100, so that the final figure will be in index form.

TELEVISION MARKET. The TV markets are the American Research Bureau's Areas of Dominant Influence (ADIs). ARB studies each county for its measurable viewing patterns. The hours of viewing accorded with each TV station whose signal reached the county are totaled; then each station's percentage share of total viewing hours is calculated. The market of origin of the TV stations with the largest share of viewing hours becomes the ADI name for that market, and all counties whose largest viewing share is given to stations of that same market of origin are grouped within the ADI. (For its purposes, ARB splits certain counties, treating each portion as if it were a separate county.) Each county (or portion) is allocated exclusively to a single ADI; thus overlap is eliminated. All of the United States is covered except for Hawaii and part of Alaska.

RAI is an index of a given population's propensity to dine out; RGI is an index of how fully that demand is met.

METROPOLITAN STATISTICAL AREAS (MSAs). In the Restaurant Growth Index, metropolitan markets are identical with Federal government's definition of MSAs or PMSAs (Primary Metropolitan Statistical Area), except in New England, where NECMAs (New England County Metropolitan Areas) are used. These metropolitan markets are counties or groups of counties which meet certain criteria of metropolitan character.

The basic criteria for metropolitan areas are:

1. Each metropolitan statistical area must include a city which, with contiguous and densely settled territory, constitutes a Census Bureau defined urbanized area with at least 50,000 population.

2. If metropolitan statistical area's largest city has less than 50,000 population, the area must have a total population of at least 100,000.

Thus, a city of 50,000 or an urbanized area surrounding a city with 50,000 and a population density of 1,000 per square mile become a basic test of the metropolitan character of an area. The county or counties in which the city or urbanized area is located, plus surrounding counties with heavy commuting between themselves and the core counties and population density sufficient to establish them as metropolitan, are designated as the metropolitan area.

Certain areas meet many tests of metropolitan character, but are located within larger, dominating metropolitan statistical areas of one million or more population. To preserve the identity of these areas within the large, "mega-metropolitan area," the government devised a second level of metropolitan criteria. These criteria identify, within metropolitan areas of at least one million population, sub-areas that are called Primary Metropolitan Statistical Areas (PMSAs). A county or counties that express strong local opinion to be identified as a PMSA must have:

1. At least 100,000 population.

2. At least 60 percent of its population urban.

3. Less than 50 percent of its resident workers commuting to jobs outside the county.

The Restaurant Growth Index treats MSAs and PMSAs as equivalent areas, so that the most locally identifiable area that qualifies as metropolitan will be the one appearing in the statistical tables.

In New England, the official MSA definitions are based on cities and towns rather than counties. Because the Restaurant Growth Index is developed from a county level data base, we use New England County Metropolitan Areas (NECMAs) in the six New England states. NECMAs are determined by using the MSA standards as described above.

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METROPOLITAN STATISTICAL AREAS

The definitions of each metropolitan area as covered in the Restaurant Growth Index and defined by the Federal government.

Abilene, TX—Taylor
Akron, OH—Portage, Summit
Albany, GA—Dougherty, Lee
Albany-Schenectady-Troy, NY—Albany, Greene, Montgomery, Renselaer, Saratoga, Schenectady
Alburquerque, NM—Bernalillo
Alexandria, LA—Rapides
Allentown-Bethlehem, PA-NJ—Carbon, Pennsylvania; Lehigh, Pennsylvania; Northampton, Pennsylvania; Warren, New Jersey
Alton-Granite City, IL—Jersey, Madison
Altoona, PA—Blair
Amarillo, TX—Potter, Randall
Anaheim-Santa Ana, CA—Orange
Anchorage, AK—Anchorage Borough
Anderson, IN—Madison
Anderson, SC—Anderson
Ann Arbor, MI—Washtenaw
Anniston, AL—Calhoun
Appleton-Oshkosh-Neenah, WI—Calumet, Outagamie, Winnebago
Asheville, NC—Buncombe
Athens, GA—Clarke, Jackson, Madison, Oconee
Atlanta, GA—Barrow, Butts, Cherokee, Clayton, Cobb, Coweta, DeKalb, Douglas, Fayette, Forsyth, Fulton, Gwinnett, Henry, Newton, Paulding, Rockdale, Spalding, Walton
Atlantic City, NJ—Atlantic, Cape May
Augusta, GA-SC—Columbia, McDuffie, GA; Richmond, GA; Aiken, SC
Aurora-Elgin, IL—Kane, Kendall
Austin, TX—Hays, Travis, Williamson
Bakersfield, CA—Kern
Baltimore, MD—Anne Arundel, Baltimore, Carroll, Harford, Howard, Queen Anne's, Baltimore
Bangor, ME—Penobscot
Baton Rouge, LA—Ascension, East Baton Rouge, Livingston, West Baton Rouge
Battle Creek, MI—Calhoun
Beaumont-Port Arthur, TX—Hardin, Jefferson, Orange
Beaver County, PA—Beaver
Bellingham, WA—Whatcom
Benton Harbor, MI—Berrien
Bergen-Passaic, NJ—Bergen, Passaic
Billings, MT—Yellowstone
Biloxi-Gulfport, MS—Hancock, Harrison
Binghamton, NY—Broome, Tioga
Birmingham, AL—Blount, Jefferson, St. Clair, Shelby, Walker
Bismarck, ND—Burleigh, Morton
Bloomington, IN—Monroe
Bloomington-Normal, IL—McLean
Boise City, ID—Ada
Boston-Lawrence-Salem-Lowell-Brockton, MA—Essex, Middlesex, Norfolk, Plymouth, Suffolk
Boulder-Longmont, CO—Boulder
Bradenton, FL—Manatee
Brazoria, TX—Brazoria
Bremerton, WA—Kitsap
Bridgeport-Stamford-Norwalk-Danbury, CT—Fairfield
Brownsville-Harlingen, TX—Cameron
Bryan-College Station, TX—Brazos
Buffalo, NY—Erie
Burlington, NC—Alamance
Burlington, VT—Chittenden, Grand Isle
Canton, OH—Carroll, Stark
Casper, WY—Natrona
Cedar Rapids, IA—Linn
Champaign-Urbana-Rantoul, IL—Champaign
Charleston, SC—Berkeley, Charleston, Dorchester
Charleston, WV—Kanawha, Putnam
Charlotte-Gastonia-Rock Hill, NC-SC—Cabarrus, Gaston, Kannapolis, Lincoln, Mecklenburg, Rowan, Union, all NC; York, SC
Charlottesville, VA—Albemarle, Fluvanna, Greene, Charlottesville
Chattanooga, TN-GA—Hamilton, TN; Marion, TN; Sequatchie, TN; Catoosa, GA; Dade, GA; Walker, GA
Cheyenne, WY—Laramie
Chicago, IL—Cook, DuPage, McHenry
Chico, CA—Butte
Cincinnati, OH-KY-IN—Clermont, OH; Hamilton, OH; Warren, OH; Boone, KY; Campbell, KY; Kenton, KY; Dearborn, IN
Clarksville-Hopkinsville, TN-KY—Montgomery, TN; Christian, KY
Cleveland, OH—Cuyahoga, Geauga, Lake, Medina
Colorado Springs, CO-El Paso
Columbia, MO—Boone
Columbia, SC—Lexington, Richland
Columbus, GA-AL—Chattahoochee, GA; Muscogee, GA; Russell, AL
Columbus, OH—Delaware, Fairfield, Franklin, Licking, Madison, Pickaway, Union
Corpus Christi, TX—Nueces, San Patricio
Cumberland, MD-WV—Allegany, MD; Mineral, WV
Dallas, TX—Collin, Dallas, Denton, Ellis, Kaufman, Rockwall
Danville, VA—Pittsylvania, Danville
Davenport-Rock Island-Moline, IA-IL—Scott, IA; Henry, IL; Rock Island, IL
Dayton-Springfield, OH—Clark, Greene, Miami, Montgomery
Daytona Beach, FL—Volusia
Decatur, IL—Macon
Denver, CO—Adams, Arapahoe, Denver, Douglas, Jefferson
Des Moines, IA—Dallas, Polk, Warren
Detroit, MI—Lapeer, Livingston, Macomb, Monroe, Oakland, St. Clair, Wayne
Dothan, AL—Dale, Houston
Dubuque, IA—Dubuque
Duluth, MN-WI—St. Louis, MN; Douglas, WI
East St. Louis-Belleville, IL—Clinton, St. Clair
Eua Claire, WI—Chippewa, Eau Claire
El Paso, TX—El Paso
Elkhart-Goshen, IN—Elkhart
Elmira, NY—Chemung
Enid, OK—Garfield
Erie, PA—Erie
Eugene-Springfield, OR—Lane
Evansville, IN-KY—Posey, IN; Vanderburgh, IN; Warrick, IN; Henderson, KY
Fargo-Moorehead, ND-MN—Cass, ND; Clay, MN
Fayetteville, NC—Cumberland
Fayetteville-Springdale, AR—Washington
Flint, MI—Genesee
Florence, AL—Colbert, Lauderdale
Florence, SC—Florence
Fort Collins-Loveland, CO—Larimer
Fort Lauderdale-Hollywood-Pompano Beach, FL—Broward
Fort Myers, FL—Cape Coral, Lee
Fort Pierce, FL—Martin, St. Lucie
Fort Smith, AR-OK—Crawford, Sebastian, AR; Sequoyah, OK
Fort Walton Beach, FL—Okaloosa
Fort Wayne, IN—Allen, De Kalb, Whitley
Forth Worth-Arlington, TX—Johnson, Parker, Tarrant
Fresno, CA—Fresno
Gadsden, AL—Etowah
Gainesville, FL—Alachua, Bradford
Galveston-Texas City, TX—Galveston
Gary-Hammond, IN—Lake, Porter
Glens Falls, NY—Warren, Washington
Grand Forks, ND—Grand Forks
Grand Rapids, MI—Kent, Ottawa
Great Falls, MT—Cascade
Greeley, CO—Weld
Green Bay, WI—Brown
Greensboro-Winston-Salem-High Point, NC—Davidson, Davie, Forsyth, Guilford, Randolph, Stokes, Yadkin
Greenville-Spartanburg, SC—Greenville, Pickens, Spartanburg
Hagerstown, MD—Washington
Hamilton-Middletown, OH—Butler
Harrisburg-Lebanon-Carlisle, PA—Cumberland, Dauphin, Lebanon, Perry
Hartford-New Britain-Middletown-Bristol, CT—Hartford,

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MSAs *from p. 182*
Middlesex, Tolland
Hickory, NC—Alexander, Burke, Catawba
Honolulu, HI—Honolulu
Houma-Thibodaux, LA—Lafourche, Terrebonne
Houston, TX—Fort Bend, Harris, Liberty, Montgomery, Waller
Huntington-Ashland, WV-KY-OH—Cabell, WV; Wayne, WV; Boyd, KY; Carter, KY; Greenup, KY; Lawrence, OH
Huntsville, AL—Madison
Indianapolis, IN—Boone, Hamilton, Hancock, Hendricks, Johnson, Marion, Morgan, Shelby
Iowa City, IA—Johnson
Jackson, MI—Jackson
Jackson, MS—Hinds, Madison, Rankin
Jackson, TN—Madison
Jacksonville, FL—Clay, Duval, Nassau, St. Johns
Jacksonville, NC—Onslow
Janesville-Beloit, WI—Rock
Jersey City, NJ—Hudson
Johnson City-Kingsport-Bristol, TN-VA—Carter, TN; Hawkins, TN; Sullivan, TN; Unicoi, TN; Washington, TN; Scott, VA; Washington, VA; Bristol, VA
Johnstown, PA—Cambria, Somerset
Joliet, IL—Grundy, Will
Joplin, MO—Jasper, Newton
Kalamazoo, MI—Kalamazoo
Kankakee, IL—Kankakee
Kansas City, MO-KS (recombined)—Cass, Clay, Jackson, Lafayette, Platte, Ray, all MO; Johnson, Leavenworth, Miami, Wyandotte, all KS.
Kenosha, WI—Kenosha
Killeen-Temple, TX—Bell, Coryell
Knoxville, TN—Anderson, Blount, Grainger, Jefferson, Knox, Sevier, Union
Kokomo, IN—Howard, Tipton
La Crosse, WI—La Crosse
Lafayette, LA—Lafayette, St. Martin
Lafayette-West Lafayette, IN—Tippecanoe
Lake Charles, LA—Calcasieu
Lake County, IL—Lake
Lakeland-Winter Haven, FL—Polk
Lancaster, PA—Lancaster
Lansing-East Lansing, MI—Clinton, Eaton, Ingham
Laredo, TX—Webb
Las Cruces, NM—Dona Ana
Las Vegas, NV—Clark
Lawrence, KS—Douglas
Lawton, OK—Comanche
Lewiston-Auburn, ME—Androscoggin
Lexington-Fayette, KY—Bourbon, Clark, Fayette, Jessamine, Scott, Woodford
Lima, OH—Allen, Auglaize
Lincoln, NE—Lancaster
Little Rock-North Little Rock, AR—Faulkner, Lonoke, Pulaski, Saline
Longview-Marshall, TX—Gregg, Harrison
Lorain-Elyria, OH—Lorain
Los Angeles-Long Beach, CA—Los Angeles
Louisville, KY-IN—Bullitt, KY; Jefferson, KY; Oldham, KY; Shelby, KY; Clark, IN; Floyd, IN; Harrison, IN
Lubbock, TX—Lubbock
Lynchburg, VA—Amherst, Campbell, Lynchburg
Macon-Warner Robins, GA—Bibb Houston, Jones, Peach
Madison, WI—Dane
Manchester, NH—Hillsborough
Mansfield, OH—Richland
McAllen-Endinburg-Mission, TX—Hidalgo
Medford, OR—Jackson
Merced, CA—Merced
Melbourne-Titusville-Palm Bay, FL—Brevard
Memphis, TN-AR-MS—Shelby, TN; Tipton, TN; Crittenden, AR; De Sota, MS
Miami-Hialeah, FL—Dade
Middlesex-Somerset-Hunterdon, NJ—Hunterdon, Middlesex, Somerset
Midland, TX—Midland
Milwaukee, WI—Milwaukee, Ozaukee, Washington, Waukesha
Minneapolis-St. Paul, MN-WI—Anoka, MN; Carver, MN; Chisago, MN; Dakota, MN; Hennepin, MN; Isanti, MN; Ramsey, MN; Scott, MN; Washington, MN; Wright, MN; St. Croix, WI
Mobile, AL—Baldwin, Mobile
Modesto, CA—Stanislaus
Monmouth-Ocean, NJ—Monmouth, Ocean
Monroe, LA—Ouachita
Montgomery, AL—Autauga, Elmore, Montgomery
Muncie, IN—Delaware
Muskegon, MI—Muskegon
Naples, FL—Collier
Nashville, TN—Cheatham, Davidson, Dickson, Robertson, Rutherford, Sumner, Williamson, Wilson
Nassau-Suffolk, NY—Nassau, Suffolk
New Bedford, Fall River-Attleboro, MA—Bristol
New Haven-Waterbury-Meriden, CT—New Haven
New London-Norwich, CT—New London
New Orleans, LA—Jefferson, Orleans, St. Bernard, St. Charles, St. John the Baptist, St. Tammany
New York, NY—Bronx, Kings, New York, Putnam, Queens, Richmond, Rockland, Westchester
Newark, NJ—Essex, Morris, Sussex, Union
Niagara Falls, NY—Niagara
Norfolk-Virginia Beach-Newport News, VA—Gloucester, James City, York, Chesapeake, Hampton, Newport News, Norfolk, Poquoson, Portsmouth, Suffolk, Virginia Beach, Williamsburg
Oakland, CA—Alameda, Contra Costa
Ocala, FL—Marion
Odessa, TX—Ector
Oklahoma City, OK—Canadian, Cleveland, Logan, McClain, Oklahoma, Pottawatomie
Olympia, WA—Thurston
Omaha, NE-IA—Douglas, NE; Sarpy, NE; Washington, NE; Pottawattamie, IA
Orange County, NY—Orange
Orlando, FL—Orange, Osceola, Seminole
Owensboro, KY—Daviess
Oxnard-Ventura, CA—Ventura
Panama City, FL—Bay
Parkersburg-Marietta, WV-OH—Wood, WV; Washington, OH
Pascagoula, MS—Jackson
Pensacola, FL—Escambia, Santa Rosa
Peoria, IL—Peoria, Tazewell, Woodford
Philadelphia, PA-NJ—Bucks, PA; Chester, PA; Delaware, PA; Montgomery, PA; Philadelphia, PA; Burlington, NJ; Camden, NJ; Gloucester, NJ
Phoenix, AZ—Maricopa
Pine Bluff, AR—Jefferson
Pittsburgh, PA—Allegheny, Fayette, Washington, Westmoreland
Pittsfield, MA—Bershire
Portland, ME—Cumberland
Portland, OR—Clackamas, Multnomah, Washington, Yamhill
Portsmouth-Dover-Rochester, NH—Rockingham, Strafford
Poughkeepsie, NY—Dutchess
Providence-Pawtucket-Woonsocket, RI—Bristol, Kent, Providence, Washington
Provo-Orem, UT—Utah
Pueblo, CO—Pueblo
Racine, WI—Racine
Raleigh-Durham, NC—Durham, Franklin, Orange, Wake
Rapid City, SD—Pennington
Reading, PA—Berks
Redding, CA—Shasta
Reno, NV—Washoe
Richland-Kennewick-Pasco, WA—Benton, Franklin
Richmond-Petersburg, VA—Charles City, Chesterfield, Dinwiddie, Goochland, Hanover, Henrico, New Kent, Pawhatan, Prince George, Colonial Heights, Hopewell Petersburg, Richmond
Riverside-San Bernardino, CA—Riverside, San Bernardino
Roanoke, VA—Botetourt, Roanoke County, Roanoke City, Salem
Rochester, MN—Olmstead
Rochester, NY—Livingston, Monroe, Ontario, Orleans, Wayne
Rockford, IL—Boone, Winnebago
Sacramento, CA—El Dorado, Placer, Sacramento, Yolo, Roseville City
Saginaw-Bay City-Midland, MI—Bay, Midland, Saginaw
Santa Fe, NM—Los Alamos, Santa Fe
St. Cloud, MN—Benton, Sherburne, Stearns
St. Joseph, MO—Buchanan
St. Louis, MO-IL—Franklin, MO; Jefferson, MO: St. Charles, MO; St. Louis County, MO; St. Louis City, MO; Monroe, IL
Salem, OR—Marion, Polk
Salinas-Seaside-Monterey, CA—Monterey
Salt Lake City-Ogden, UT—Davis, Salt Lake, Weber
San Angelo, TX—Tom Green
San Antonio, TX—Bexar, Comal, Guadalupe
San Diego, CA—San Diego
San Francisco, CA—Marin, San Francisco, San Mateo
San Jose, CA—Santa Clara
Santa Barbara-Santa Maria-Lompoc, CA—Santa Barbara
Santa Cruz, CA—Santa Cruz
Santa Rosa-Petaluma, CA—Sonoma
Sarasota, FL—Sarasota
Savannah, GA—Chatham, Effingham
Scranton-Wilkes-Barre, PA—Columbia, Lackawanna, Luzerne, Monroe, Wyoming
Seattle, WA—King, Snohomish
Sharon, PA—Mercer
Sheboygan, WI—Sheboygan
Sherman-Denison, TX—Grayson
Shreveport, LA—Bossier, Caddo
Sioux City, IA-NE—Woodbury, IA, Dakota, NE
Sioux Falls, SD—Minnehaha
South Bend-Mishawaka, IN—St. Joseph
Spokane, WA—Spokane
Springfield, IL—Menard, Sangamon

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TOOLS OF THE TRADE

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- Low profile . . . less than 45" high.
- Two models available . . . 48" and 72" wide.
- Large convenient display area . . . the RPD-4 has 14.6 sq. ft. and the RPD-6 has 22.9 sq. ft. of shelf area.
- Extra refrigerated storage . . . convenient refrigerated drawer storage below the display area.
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- Energy efficient . . . foamed-in-place insulation, automatic defrost, fully adjustable thermostat control . . . units draw only 6 or 7 amps of power depending upon model.
- Self-closing sliding doors . . . easy access and faster service.
- Easy service and maintenance . . . convenient slide-out refrigeration unit with front air discharge.

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For information circle number 195

MSAs *from p. 184.*

Springfield, MA—Hampden, Hampshire
Springfield, MO—Christian, Greene
State College, PA—Centre
Steubenville-Weirton, OH-WV—Jefferson, OH; Brooke, WV; Hancock, WV
Stockton, CA—San Joaquin
Syracuse, NY—Madison, Onondaga, Oswego
Tacoma, WA—Pierce
Tallahassee, FL—Gadsden, Leon
Tampa-St. Petersburg-Clearwater,FL—Hernando, Hillsborough, Pasco, Pinellas
Terre Haute, IN—Clay, Vigo
Texarkana, TX-Texarkana, AR—Bowie, TX; Miller, AR
Toledo, OH—Fulton, Lucas, Wood
Topeka, KS—Shawnee
Trenton, NJ—Mercer
Tucson, AZ—Pima
Tulsa, OK—Creek, Osage, Rogers, Tulsa, Wagoner
Tuscaloosa, AL—Tuscaloosa
Tyler, TX—Smith
Utica-Rome, NY—Herkimer, Oneida
Vallejo-Fairfield-Napa, CA—Napa, Solano
Vancouver, WA—Clark
Victoria, TX—Victoria
Vineland-Millville-Bridgeton, NJ—Cumberland
Visalia-Tulare-Porterville, CA—Tulare
Waco, TX—McLennan
Washington, DC-MD-VA—District of Columbia; Calvert, MD; Charles, MD; Frederick, MD; Montgomery, MD; Prince George's, MD; Arlington, VA; Fairfax, VA; Loudon, VA; Prince William, VA; Stafford, VA; Alexandria, VA; Falls Church, VA; Manassas, VA; Manassas Park, VA
Waterloo-Cedar Falls, IA—Black Hawk, Bremer
Wausau, WI—Marathon
West Palm Beach-Boca Raton-Delray Beach, FL—Palm Beach
Wheeling, WV-OH—Marshall, WV; Ohio, WV; Belmont, OH
Wichita, KS—Butler, Sedgwick
Wichita Falls, TX—Wichita
Williamsport, PA—Lycoming
Wilmington, DE-MD-NJ—New Castle, DE: Cecil, MD; Salem, NJ
Wilmington, NC—New Hanover
Worcester, MA—Worcester
Yakima, MA—Yakima
York, PA—Adams, York
Youngstown-Warren, OH—Mahoning, Trumbull
Yuba City, CA—Sutter, Yuba

RGI REGIONAL SUMMARY

REGION State	12/31/85 Population (Thous.)	% Of U.S.	Average House-hold Size	Eating & Drinking Place Sales ($000)	1985 Eating Place Sales ($000)	Units	Fast Food Sales ($000)	Market Share (%)	Restaurant Sales ($000)	Market Share (%)	RAI	RGI
Connecticut	3,175.9	1.3187	2.75	2,177,374	2,024,197	4,107	615,587	30	1,136,418	56	104	98
Maine	1,175.4	0.4881	2.73	619,906	602,090	1,677	217,630	36	338,639	56	83	78
Massachusetts	5,847.4	2.4279	2.70	4,915,469	4,580,301	7,597	1,243,844	27	2,683,405	59	129	106
New Hampshire	1,000.7	0.4156	2.72	646,034	632,073	1,471	183,891	29	390,742	62	86	89
Rhode Island	969.5	0.4026	2.75	595,673	545,607	1,330	167,922	31	321,995	59	106	82
Vermont	537.8	0.2233	2.71	334,538	310,410	856	84,495	27	192,543	62	90	83
NEW ENGLAND	**12,706.7**	**5.2762**	**2.72**	**9,288,994**	**8,694,678**	**17,038**	**2,513,369**	**29**	**5,063,742**	**58**	**111**	**97**
New Jersey	7,618.9	3.1635	2.76	4,389,237	3,834,059	8,436	1,158,695	30	2,106,589	55	87	133
New York	17,966.2	7.4600	2.69	10,302,442	9,548,985	21,857	2,602,716	27	5,370,998	56	107	96
Pennsylvania	12,012.0	4.9877	2.67	5,783,200	5,194,029	12,573	1,864,767	36	2,617,342	50	89	99
MIDDLE ATLANTIC	**37,597.1**	**15.6112**	**2.70**	**20,474,879**	**18,577,073**	**42,866**	**5,626,178**	**30**	**10,094,929**	**54**	**97**	**104**
Illinois	11,640.4	4.8333	2.73	5,716,552	5,257,805	13,390	2,043,063	39	2,674,788	51	104	96
Indiana	5,585.8	2.3194	2.79	2,915,288	2,713,599	6,720	1,269,997	47	1,161,366	43	101	87
Michigan	9,211.9	3.8251	2.78	4,646,501	4,230,593	10,105	1,631,163	39	2,170,496	51	101	94
Ohio	10,836.0	4.4994	2.70	5,731,934	5,278,643	12,505	2,264,402	43	2,495,816	47	96	91
Wisconsin	4,818.0	2.0006	2.71	2,483,631	2,095,452	6,155	706,588	34	1,251,030	60	100	83
EAST NORTH CENTRAL	**42,092.1**	**17.4778**	**2.74**	**21,493,906**	**19,576,092**	**48,875**	**7,915,213**	**40**	**9,753,496**	**50**	**100**	**91**
Iowa	2,942.8	1.2219	2.62	1,196,718	1,053,377	4,015	451,927	43	507,063	48	69	70
Kansas	2,470.5	1.0258	2.66	1,085,019	1,037,466	3,415	516,723	50	427,783	41	80	75
Minnesota	4,224.3	1.7540	2.73	2,191,748	1,974,551	5,011	649,165	33	1,162,262	59	89	97
Missouri	5,093.8	2.1151	2.74	2,510,812	2,372,749	6,026	1,056,987	45	1,032,513	44	86	94
Nebraska	1,622.4	0.6737	2.66	820,818	713,363	2,172	293,614	41	368,551	52	95	79
North Dakota	699.9	0.2906	2.83	305,831	255,396	912	99,233	39	141,538	55	87	82
South Dakota	719.3	0.2987	2.72	312,914	268,468	1,033	90,026	34	161,026	60	83	69
WEST NORTH CENTRAL	**17,773.0**	**7.3798**	**2.70**	**8,423,860**	**7,675,370**	**22,584**	**3,157,675**	**41**	**3,800,736**	**50**	**84**	**84**
Delaware	621.4	0.2580	2.81	348,431	325,455	760	138,883	43	162,041	50	94	98
District of Columbia	621.0	0.2579	2.45	711,749	667,892	1,085	167,882	25	342,306	51	265	159
Florida	11,435.2	4.7482	2.51	7,012,351	6,608,319	13,769	2,350,610	36	3,554,998	54	108	107
Georgia	5,990.5	2.4874	2.82	3,163,127	3,026,148	6,195	1,533,930	51	1,144,110	38	104	115
Maryland	4,436.4	1.8421	2.79	2,590,343	2,393,102	4,517	974,179	41	1,074,131	45	98	115
North Carolina	6,304.9	2.6179	2.74	2,871,549	2,806,662	6,997	1,473,501	53	1,061,856	38	87	96
South Carolina	3,396.3	1.4102	2.83	1,507,114	1,463,198	3,434	728,763	50	551,347	38	89	108
Virginia	5,785.0	2.4021	2.85	2,849,813	2,803,152	6,415	1,231,191	44	1,226,914	44	93	109
West Virginia	1,967.9	0.8171	2.69	646,292	616,468	1,835	349,143	57	215,960	35	66	91
SOUTH ATLANTIC	**40,558.6**	**16.8409**	**2.70**	**21,700,769**	**20,710,396**	**45,007**	**8,948,082**	**43**	**9,333,663**	**45**	**99**	**108**
Alabama	4,079.8	1.6940	2.75	1,381,116	1,334,117	3,481	753,989	57	432,255	32	75	103
Kentucky	3,786.2	1.5722	2.80	1,576,486	1,504,356	3,624	839,443	56	537,686	36	86	97
Mississippi	2,647.3	1.0992	2.89	799,540	774,628	2,233	418,699	54	266,891	34	66	101
Tennessee	4,793.2	1.9902	2.72	2,247,416	2,184,400	4,952	1,036,140	47	925,218	42	90	105
EAST SOUTH CENTRAL	**15,306.5**	**6.3556**	**2.77**	**6,004,558**	**5,797,501**	**14,290**	**3,048,271**	**53**	**2,162,050**	**37**	**81**	**102**
Arkansas	2,401.6	0.9972	2.75	877,508	857,617	2,624	486,754	57	286,835	33	82	82
Louisiana	4,532.6	1.8820	2.86	2,366,970	2,215,569	4,223	930,949	42	834,604	38	92	111
Oklahoma	3,356.0	1.3935	2.64	1,913,125	1,858,834	4,317	900,640	48	704,643	38	102	80
Texas	16,408.7	6.8133	2.82	9,925,958	9,267,154	18,961	3,998,833	43	3,927,330	42	100	101
WEST SOUTH CENTRAL	**26,698.9**	**11.0860**	**2.80**	**15,083,561**	**14,199,174**	**30,125**	**6,317,176**	**44**	**5,753,412**	**41**	**98**	**98**
Arizona	3,252.2	1.3504	2.62	1,828,599	1,689,745	3,589	612,454	36	896,801	53	92	109
Colorado	3,269.7	1.3576	2.57	2,291,704	2,128,726	4,478	671,172	32	1,213,005	57	109	100
Idaho	1,029.9	0.4277	2.93	431,371	390,507	1,204	151,417	39	213,757	55	75	86
Montana	836.7	0.3474	2.60	464,848	365,585	1,349	128,189	35	219,530	60	75	69
Nevada	940.9	0.3906	2.46	683,670	606,819	1,122	209,336	34	323,626	53	93	541
New Mexico	1,475.7	0.6128	2.82	775,950	720,147	1,880	306,975	43	342,314	48	92	85
Utah	1,698.8	0.7054	3.24	597,299	576,549	1,644	256,596	45	280,262	49	75	104
Wyoming	516.4	0.2144	2.73	341,985	289,068	726	113,039	39	152,555	53	86	106
MOUNTAIN	**13,020.3**	**5.4063**	**2.71**	**7,415,426**	**6,767,146**	**15,992**	**2,449,178**	**36**	**3,641,850**	**54**	**92**	**128**
Alaska	537.8	0.2233	2.90	547,066	458,791	682	138,667	30	205,924	45	120	121
California	26,345.3	10.9393	2.71	18,322,054	17,291,415	33,881	6,086,581	35	9,771,472	57	119	96
Hawaii	1,071.3	0.4448	3.21	1,171,624	1,101,277	1,543	363,527	33	626,450	57	199	165
Oregon	2,709.2	1.1249	2.61	1,562,421	1,433,957	4,018	525,550	37	795,010	55	114	74
Washington	4,416.7	1.8339	2.58	2,723,391	2,504,598	5,694	833,925	33	1,450,421	58	106	88
PACIFIC	**35,080.3**	**14.5662**	**2.70**	**24,326,556**	**22,790,038**	**45,818**	**7,948,250**	**35**	**12,849,277**	**56**	**119**	**97**
United States Total	**240,833.5**	**100.0000**	**2.72**	**134,212,509**	**124,787,468**	**282,595**	**47,923,392**	**38**	**62,453,155**	**50**	**100**	**100**

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SALES BY METROPOLITAN AREA

This section of the Restaurant Growth Index provides sales, unit counts, market share, and RAI/RGI indexes for 317 Metropolitan Statisticals Areas (MSAs).

STATE Metro Name	12/31/85 Population (Thous.)	% Of U.S.	Average House-hold Size	1985 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Units	Fast Food Sales ($000)	Market Share (%)	Restaurant Sales ($000)	Market Share (%)	RAI	RGI
ALABAMA												
Anniston	125.7	0.0522	2.85	34,759	34,039	97	19,404	57	10,723	32	84	110
Birmingham	922.1	0.3829	2.66	355,183	342,686	838	181,611	53	114,344	33	81	106
Dothan	128.5	0.0534	2.78	59,348	57,909	136	36,272	63	17,224	30	90	94
Florence	141.0	0.0585	2.68	49,577	47,797	134	27,250	57	15,056	31	89	88
Gadsden	105.2	0.0437	2.67	36,801	35,991	108	20,517	57	11,337	31	74	79
Huntsville	213.1	0.0885	2.70	109,925	104,795	198	56,941	54	37,704	36	113	135
Mobile	473.8	0.1966	2.79	210,091	197,785	436	103,419	52	67,405	34	77	106
Montgomery	293.9	0.1222	2.80	120,659	116,524	254	66,427	57	36,706	32	90	122
Tuscaloosa	144.2	0.0598	2.76	60,872	57,292	129	32,661	57	18,049	32	75	104
Non-Metro Portion of State	1,483.8	0.6160	2.79	331,591	327,208	1,113	202,593	62	99,901	31	58	95
State Total	**4,079.8**	**1.6940**	**2.75**	**1,381,116**	**1,334,117**	**3,481**	**753,989**	**57**	**432,255**	**32**	**75**	**103**
ALASKA												
Anchorage	237.1	0.0984	2.71	326,998	290,667	293	92,684	32	123,275	42	171	150
Non-Metro Portion of State	300.7	0.1249	3.07	220,068	168,124	389	45,983	27	82,649	49	80	99
State Total	**537.8**	**0.2233**	**2.90**	**547,066**	**458,791**	**682**	**138,667**	**30**	**205,924**	**45**	**120**	**121**
ARIZONA												
Phoenix	1,841.1	0.7644	2.56	1,152,255	1,075,003	1,976	374,519	35	575,024	53	96	125
Tucson	634.6	0.2635	2.51	348,092	317,774	701	126,434	40	156,982	49	100	96
Non-Metro Portion of State	776.5	0.3225	2.88	328,252	296,968	912	111,501	38	164,795	55	73	84
State Total	**3,252.2**	**1.3504**	**2.62**	**1,828,599**	**1,689,745**	**3,589**	**612,454**	**36**	**896,801**	**53**	**92**	**109**
ARKANSAS												
Fayetteville - Springdale	107.6	0.0446	2.70	59,601	57,904	160	32,605	56	20,104	35	107	71
Fort Smith	178.5	0.0741	2.72	79,207	78,184	230	43,686	56	27,275	35	114	75
Little Rock - North Little Rock	505.0	0.2097	2.75	262,405	257,036	543	133,991	52	94,066	37	102	107
Pine Bluff	90.0	0.0373	2.94	28,615	27,745	98	15,624	56	9,633	35	64	80
Texarkana	120.7	0.0501	2.73	61,652	59,868	138	28,314	47	23,801	40	90	84
Non-Metro Portion of State	1,466.9	0.6093	2.73	413,720	404,555	1,533	242,276	60	126,564	31	70	75
State Total	**2,401.6**	**0.9972**	**2.75**	**877,508**	**857,617**	**2,624**	**486,754**	**57**	**286,835**	**33**	**82**	**82**
CALIFORNIA												
Anaheim - Santa Ana	2,124.0	0.8819	2.81	1,824,914	1,754,791	2,974	610,850	35	1,019,100	58	144	102
Bakersfield	475.8	0.1976	2.81	278,631	263,938	554	112,089	42	135,730	51	99	91
Chico	166.7	0.0692	2.47	91,207	83,275	213	29,533	35	46,887	56	77	68
Fresno	578.8	0.2403	2.79	267,519	249,017	730	111,323	45	127,165	51	88	76
Los Angeles - Long Beach	8,091.4	3.3597	2.73	5,531,501	5,252,265	9,562	1,758,275	33	2,972,577	57	121	107
Merced	163.2	0.0678	3.00	68,748	63,098	154	23,035	37	38,246	61	94	88
Modesto	306.1	0.1271	2.84	145,153	138,237	355	66,986	48	62,899	46	82	76
Oakland	1,903.2	0.7903	2.59	1,212,564	1,135,110	2,330	436,547	38	614,992	54	105	95
Oxnard - Ventura	609.0	0.2529	3.04	264,565	253,329	631	90,703	36	149,614	59	87	96
Redding	131.7	0.0547	2.67	61,834	57,022	195	20,223	35	32,106	56	72	69
Riverside - San Bernardino	1,896.4	0.7874	2.77	1,061,835	1,013,009	2,091	448,511	44	518,569	51	99	90
Sacramento	1,266.4	0.5258	2.57	860,188	805,445	1,770	334,992	42	418,693	52	111	86
Salinas - Seaside - Monterey	332.8	0.1382	3.05	211,055	200,791	467	61,674	31	134,352	67	143	110
San Diego	2,140.9	0.8890	2.72	1,469,036	1,380,861	2,619	481,393	35	783,800	57	130	104
San Francisco	1,556.0	0.6461	2.37	2,057,238	1,905,828	2,996	442,782	23	1,199,010	63	180	110

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RGI METRO REPORT

STATE Metro Name	12/31/85 Population (Thous.)	% Of U.S.	Average Household Size	1985 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Eating Place Units	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
San Jose	1,393.3	0.5785	2.85	1,055,277	1,008,106	1,772	390,935	39	531,074	53	128	118
Santa Barbara - Santa Maria - Lompoc	330.6	0.1373	2.65	299,161	284,571	513	81,307	29	187,919	66	126	92
Santa Cruz	217.5	0.0903	2.63	140,272	129,714	355	52,783	41	69,528	54	109	65
Santa Rosa - Petaluma	340.4	0.1413	2.53	198,895	182,964	466	69,385	38	102,313	56	93	77
Stockton	406.9	0.1689	2.71	214,417	199,754	489	97,237	49	95,465	48	98	76
Vallejo - Fairfield - Napa	381.4	0.1583	2.81	226,004	209,223	424	85,659	41	115,131	55	101	93
Visalia - Tulare - Porterville	283.3	0.1176	3.06	122,112	113,849	318	59,075	52	50,180	44	72	78
Yuba City	111.1	0.0462	2.72	53,065	48,818	127	17,312	35	27,486	56	84	77
Non-Metro Portion of State	1,138.4	0.4729	2.71	606,863	558,400	1,776	203,972	37	338,636	61	78	69
State Total	**26,345.3**	**10.9393**	**2.71**	**18,322,054**	**17,291,415**	**33,881**	**6,086,581**	**35**	**9,771,472**	**57**	**119**	**98**
COLORADO												
Boulder - Longmont	219.0	0.0910	2.57	167,234	158,358	295	51,500	33	94,053	59	105	94
Colorado Springs	352.9	0.1465	2.69	221,714	204,145	439	87,119	43	90,968	45	117	98
Denver	1,635.1	0.6788	2.49	1,261,876	1,175,346	1,982	356,785	30	661,499	56	117	118
Fort Collins - Loveland	178.4	0.0741	2.63	93,574	85,841	222	27,680	32	48,484	56	93	88
Greeley	138.8	0.0576	2.74	53,221	49,121	142	15,838	32	27,744	56	80	84
Pueblo	125.4	0.0521	2.62	62,240	54,616	172	17,610	32	30,847	56	77	71
Non-Metro Portion of State	620.1	0.2575	2.65	431,345	401,299	1,226	114,640	29	259,410	65	99	80
State Total	**3,269.7**	**1.3576**	**2.57**	**2,291,704**	**2,128,726**	**4,478**	**671,172**	**32**	**1,213,005**	**57**	**109**	**100**
CONNECTICUT												
Bridgeport - Stamford - Norwalk - Danbury	820.2	0.3406	2.80	619,358	589,430	1,050	149,257	25	353,813	60	107	100
Hartford - New Britain - Middletown - Bristol	1,075.4	0.4465	2.73	771,467	710,122	1,361	225,600	32	368,016	52	110	108
New Haven - Waterbury - Meriden	773.5	0.3212	2.72	500,443	465,391	1,060	157,041	34	261,113	56	99	85
New London - Norwich	246.4	0.1023	2.76	168,193	149,839	316	50,960	34	89,047	59	109	100
Non-Metro Portion of State	260.4	0.1081	2.75	117,913	109,415	320	32,729	30	64,429	59	73	86
State Total	**3,175.9**	**1.3187**	**2.75**	**2,177,374**	**2,024,197**	**4,107**	**615,587**	**30**	**1,136,418**	**56**	**104**	**98**
DELAWARE												
Wilmington	542.1	0.2251	[illegible]	274,140	253,677	577	109,615	43	125,893	50	90	115
Non-Metro Portion of State	213.8	0.0887	2.82	119,630	111,960	299	47,658	43	56,466	50	102	70
State Total	**621.4**	**0.2580**	**2.81**	**348,431**	**325,455**	**760**	**138,883**	**43**	**162,041**	**50**	**94**	**98**
DISTRICT OF COLUMBIA												
Washington	3,492.5	1.4504	2.70	2,554,070	2,467,739	3,945	861,778	35	1,188,769	48	121	141
State Total	**621.0**	**0.2579**	**2.45**	**711,749**	**667,892**	**1,085**	**167,882**	**25**	**342,306**	**51**	**265**	**159**
FLORIDA												
Bradenton	177.6	0.0738	2.35	112,351	108,222	195	39,144	36	57,581	53	104	86
Daytona Beach	313.9	0.1303	2.36	204,059	189,264	457	70,130	37	96,956	51	108	99
Fort Lauderdale - Hollywood - Pompano Beach	1,159.1	0.4813	2.36	936,394	867,542	1,565	247,653	29	529,337	61	136	98
Fort Myers - Cape Coral	267.5	0.1111	2.38	154,501	148,480	369	48,546	33	91,666	62	94	80
Fort Pierce	200.9	0.0834	2.48	84,313	81,168	208	33,374	41	41,876	52	69	80
Fort Walton Beach	133.5	0.0554	2.76	91,064	86,602	185	31,328	36	46,079	53	139	97
Gainesville	194.9	0.0809	2.68	120,151	114,751	257	41,844	36	60,944	53	102	92
Jacksonville	817.6	0.3395	2.65	450,969	427,421	1,006	203,778	48	182,021	43	115	110
Lakeland - Winter Haven	363.6	0.1510	2.69	157,311	151,213	363	76,769	51	63,831	42	77	99
Melbourne - Titusville - Palm Bay	344.9	0.1432	2.49	179,102	166,228	416	64,158	39	81,755	49	108	88
Miami - Hialeah	1,771.6	0.7356	2.66	1,106,903	1,048,742	2,141	345,055	33	551,570	53	117	122

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RGI METRO REPORT

STATE Metro Name	12/31/85 Population (Thous.)	% Of U.S.	Average House-hold Size	1985 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Units	Fast Food Sales ($000)	Market Share (%)	Restaurant Sales ($000)	Market Share (%)	RAI	RGI
Naples	117.9	0.0469	2.40	95,042	88,308	182	36,318	41	45,560	52	98	91
Ocala	167.3	0.0695	2.56	67,111	64,285	164	23,254	36	34,204	53	71	83
Orlando	864.1	0.3588	2.66	640,045	616,084	1,019	232,355	38	325,987	53	129	171
Panama City	114.7	0.0477	2.64	96,951	90,894	196	32,877	36	48,364	53	188	84
Pensacola	329.4	0.1368	2.74	163,362	149,173	321	73,943	50	55,766	37	96	112
Sarasota	247.6	0.1028	2.19	177,091	170,249	339	42,498	25	114,453	67	115	81
Tallahassee	212.0	0.0880	2.70	121,971	116,408	243	42,338	36	61,860	53	111	113
Tampa - St. Petersburg - Clearwater	1,870.0	0.7765	2.38	1,132,154	1,061,782	2,168	389,610	37	545,029	51	101	103
West Palm Beach - Boca Raton - Delray Beach	730.5	0.3033	2.34	533,508	499,422	897	126,247	25	332,718	67	112	117
Non-Metro Portion of State	1,036.6	0.4304	2.56	387,998	362,081	1,078	149,391	41	187,441	52	68	81
State Total	**11,435.2**	**4.7482**	**2.51**	**7,012,351**	**6,608,319**	**13,769**	**2,350,610**	**36**	**3,554,998**	**54**	**108**	**107**
GEORGIA												
Albany	118.2	0.0490	2.99	61,439	57,699	113	29,606	51	21,832	38	94	117
Athens	139.8	0.0579	2.75	77,221	71,607	163	36,806	51	27,143	38	97	93
Atlanta	2,460.7	1.0220	2.73	1,815,366	1,726,958	2,881	804,486	47	691,709	40	133	127
Augusta	378.7	0.1571	2.84	161,199	154,021	351	83,594	54	46,486	30	92	115
Columbus	242.8	0.1009	2.95	104,577	98,889	233	51,442	52	36,661	37	106	92
Macon - Warner Robins	279.5	0.1160	2.83	129,507	125,366	294	64,700	52	47,195	38	89	107
Savannah	234.1	0.0971	2.78	165,835	155,568	270	79,789	51	58,848	38	130	114
Non-Metro Portion of State	2,190.8	0.9099	2.91	668,989	656,394	1,959	390,918	60	220,647	34	69	102
State Total	**5,990.5**	**2.4874**	**2.82**	**3,163,127**	**3,026,148**	**6,195**	**1,533,930**	**51**	**1,144,110**	**38**	**104**	**115**
HAWAII												
Honolulu	828.2	0.3439	3.23	919,420	855,274	1,137	294,026	34	462,034	54	232	153
Non-Metro Portion of State	243.1	0.1009	3.13	252,204	246,003	406	69,501	28	164,416	67	132	198
State Total	**1,071.3**	**0.4448**	**3.21**	**1,171,624**	**1,101,277**	**1,543**	**363,527**	**33**	**626,450**	**57**	**198**	**165**
IDAHO												
Boise	198.8	0.0826	2.73	125,230	115,625	252	44,241	38	61,756	53	113	98
Non-Metro Portion of State	831.1	0.3451	2.99	306,141	274,882	952	107,176	39	152,001	55	66	83
State Total	**1,029.9**	**0.4277**	**2.93**	**431,371**	**390,507**	**1,204**	**151,417**	**39**	**213,757**	**55**	**75**	**88**
ILLINOIS												
Aurora - Elgin	349.2	0.1451	2.86	154,130	141,730	367	52,634	37	72,116	51	97	100
Bloomington - Normal	125.1	0.0519	2.75	74,310	67,735	171	26,764	40	34,078	50	118	80
Champaign - Urbana - Rantoul	168.8	0.0701	2.74	110,840	99,385	218	39,268	40	50,002	50	135	97
Chicago	6,127.1	2.5441	2.74	3,422,880	3,207,466	6,980	1,130,337	35	1,706,216	53	118	111
Davenport - Rock Island - Moline	389.5	0.1616	2.65	215,824	187,278	493	86,624	46	80,433	43	101	82
Decatur	131.7	0.0547	2.32	59,864	52,668	137	20,811	40	26,497	50	84	106
Joliet	383.6	0.1593	3.05	129,822	118,567	353	48,366	41	60,814	51	95	93
Kankakee	104.1	0.0432	2.81	47,178	44,597	127	17,623	40	22,436	50	100	74
Lake County	472.6	0.1962	3.02	202,607	188,388	521	64,146	34	106,389	56	104	93
Peoria	370.8	0.1539	2.70	163,874	148,627	457	62,629	42	77,223	52	89	92
Rockford	282.0	0.1171	2.70	139,627	125,428	355	50,327	40	65,024	52	91	89
Springfield	195.4	0.0812	2.48	103,068	93,538	255	36,969	40	47,067	50	103	93
Non-Metro Portion of State	2,117.2	0.8791	2.63	735,681	649,458	2,583	327,299	50	279,295	43	73	61
State Total	**11,640.4**	**4.8333**	**2.73**	**5,716,552**	**5,257,805**	**13,390**	**2,043,063**	**39**	**2,674,788**	**51**	**104**	**96**
INDIANA												
Anderson	132.4	0.0550	2.72	62,771	56,598	151	26,643	47	24,117	43	78	86

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RGI METRO REPORT

STATE Metro Name	12/31/85 Population (Thous.)	% Of U.S.	Average House-hold Size	Eating & Drinking Place Sales ($000)	1985 Eating Place Sales ($000)	Eating Place Units	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Bloomington	101.4	0.0421	2.82	59,392	55,233	124	26,003	47	23,533	43	122	84
Elkhart - Goshen	145.9	0.0605	2.79	80,967	76,554	203	36,037	47	32,620	43	82	79
Evansville	285.4	0.1184	2.65	168,586	156,004	374	79,389	51	62,798	40	96	89
Fort Wayne	357.3	0.1484	2.78	209,598	195,187	474	69,011	35	110,373	57	114	92
Gary - Hammond	643.1	0.2670	2.93	370,435	346,991	723	164,163	47	153,914	44	104	92
Indianapolis	1,208.6	0.5017	2.72	780,037	738,946	1,446	343,357	46	296,588	40	127	105
Kokomo	103.8	0.0431	2.70	62,917	57,192	140	26,926	47	24,366	43	107	84
Lafayette - West Lafayette	122.8	0.0510	2.88	75,973	70,472	143	33,175	47	30,027	43	135	102
Muncie	124.7	0.0518	2.81	80,847	75,598	163	35,590	47	32,212	43	119	81
South Bend - Mishawaka	238.7	0.0992	2.72	144,378	133,456	352	53,483	40	70,686	53	112	78
Terre Haute	134.2	0.0557	2.73	84,945	78,314	168	36,868	47	33,369	43	104	83
Non-Metro Portion of State	1,807.8	0.7507	2.81	661,502	604,160	2,089	303,276	50	242,881	40	77	73
State Total	**5,585.8**	**2.3194**	**2.79**	**2,915,288**	**2,713,599**	**6,720**	**1,269,997**	**47**	**1,161,366**	**43**	**101**	**87**
IOWA												
Cedar Rapids	172.1	0.0714	2.58	83,559	74,782	217	32,368	43	35,654	48	80	91
Davenport - Rock Island - Moline	389.5	0.1616	2.65	215,824	197,278	493	86,624	44	80,433	41	101	82
Des Moines	384.3	0.1596	2.52	209,669	191,397	537	82,980	43	84,812	44	81	88
Dubuque	92.1	0.0382	2.95	43,555	38,450	123	16,653	43	18,331	48	88	75
Iowa City	86.0	0.0357	2.57	45,458	38,582	98	16,711	43	18,394	48	99	116
Sioux City	118.4	0.0492	2.64	53,804	47,432	149	20,452	43	22,840	48	71	78
Waterloo - Cedar Falls	157.8	0.0655	2.73	69,026	59,838	211	25,809	43	28,705	48	83	73
Non-Metro Portion of State	1,695.3	0.7040	2.62	561,529	488,302	2,391	202,861	42	250,116	51	58	59
State Total	**2,942.8**	**1.2219**	**2.62**	**1,196,718**	**1,053,377**	**4,015**	**451,927**	**43**	**507,063**	**48**	**69**	**70**
KANSAS												
Kansas City	1,497.5	0.6216	2.67	874,566	839,015	1,777	377,334	45	381,909	46	101	110
Lawrence	71.7	0.0298	2.82	39,722	36,238	96	18,111	50	14,933	41	109	79
Topeka	160.3	0.0665	2.56	95,055	89,368	238	44,667	50	36,827	41	90	88
Wichita	431.6	0.1792	2.61	224,565	216,727	672	99,759	46	90,824	42	96	78
Non-Metro Portion of State	1,246.2	0.5176	2.65	469,630	445,760	1,820	227,061	51	183,178	41	70	62
State Total	**2,470.5**	**1.0258**	**2.66**	**1,085,019**	**1,037,466**	**3,415**	**516,723**	**50**	**427,783**	**41**	**80**	**75**
KENTUCKY												
Clarksville - Hopkinsville	154.4	0.0641	3.02	64,678	59,848	158	30,123	50	23,790	40	99	81
Huntington - Ashland	339.8	0.1409	2.72	138,951	134,076	313	86,958	65	36,116	27	87	91
Lexington-Fayette	330.7	0.1374	2.67	224,796	217,623	430	110,549	51	85,016	39	130	106
Louisville	971.0	0.4033	2.73	577,323	538,668	1,002	287,041	53	196,430	36	113	112
Owensboro	88.2	0.0366	2.72	59,508	54,539	122	30,458	56	19,130	35	107	84
Non-Metro Portion of State	2,078.1	0.8630	2.85	560,421	548,214	1,766	340,168	62	174,347	32	62	86
State Total	**3,786.2**	**1.5722**	**2.80**	**1,576,486**	**1,504,356**	**3,624**	**839,443**	**56**	**537,686**	**36**	**86**	**97**
LOUISIANA												
Alexandria	143.5	0.0596	2.88	55,047	52,792	131	22,805	43	19,794	37	81	102
Baton Rouge	554.1	0.2300	2.89	288,147	269,121	505	145,511	54	90,759	34	85	120
Houma - Thibodaux	192.1	0.0797	3.05	158,396	152,604	188	60,168	39	38,360	25	139	112
Lafayette	216.6	0.0900	2.87	178,999	166,353	253	71,541	43	61,333	37	130	117
Lake Charles	176.8	0.0735	2.86	76,549	71,229	170	30,770	43	26,705	37	62	103
Monroe	145.5	0.0604	2.85	75,242	71,691	151	30,965	43	26,880	37	103	95
New Orleans	1,348.7	0.5600	2.73	969,760	902,098	1,481	342,495	38	409,296	45	112	120
Shreveport	363.4	0.1508	2.72	188,787	176,760	368	85,741	49	70,828	40	95	101
Non-Metro Portion of State	1,391.9	0.5780	2.98	376,043	352,921	976	140,953	40	90,649	26	57	102
State Total	**4,532.6**	**1.8820**	**2.88**	**2,366,970**	**2,215,569**	**4,223**	**930,949**	**42**	**834,604**	**38**	**92**	**111**

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RGI METRO REPORT

STATE Metro Name	12/31/85 Population (Thous.)	12/31/85 % Of U.S.	12/31/85 Average Household Size	1985 Eating & Drinking Place Sales ($000)	1985 Eating Place Sales ($000)	1985 Eating Place Units	1985 Fast Food Sales ($000)	1985 Fast Food Market Share (%)	1985 Restaurant Sales ($000)	1985 Restaurant Market Share (%)	RAI	RGI
MAINE												
Bangor	138.9	0.0577	2.88	69,458	67,909	161	25,652	38	36,833	54	80	96
Lewiston - Auburn	100.9	0.0419	2.72	40,786	39,115	123	14,774	38	21,215	54	59	78
Portland	226.8	0.0942	2.63	193,857	185,110	355	60,122	32	112,455	61	95	92
Non-Metro Portion of State	708.8	0.2943	2.73	315,805	309,956	1,038	117,082	38	168,136	54	81	71
State Total	**1,175.4**	**0.4881**	**2.73**	**619,906**	**602,090**	**1,677**	**217,630**	**36**	**338,639**	**56**	**83**	**78**
MARYLAND												
Baltimore	2,291.9	0.9519	2.77	1,341,319	1,199,812	2,290	492,466	41	508,087	42	105	116
Cumberland	105.8	0.0438	2.67	44,681	41,922	135	18,061	43	18,231	43	88	77
Hagerstown	114.1	0.0474	2.82	39,018	32,367	113	13,441	42	14,381	44	64	109
Non-Metro Portion of State	318.2	0.1319	2.77	204,455	193,148	449	74,856	39	107,643	56	112	87
State Total	**4,436.4**	**1.8421**	**2.79**	**2,590,343**	**2,393,102**	**4,517**	**974,179**	**41**	**1,074,131**	**45**	**98**	**115**
MASSACHUSETTS												
Boston - Lawrence - Salem - Lowell - Brockton	3,703.1	1.5377	2.70	3,412,475	3,194,389	4,674	846,318	26	1,831,479	57	148	119
New Bedford - Fall River - Attleboro	492.9	0.2046	2.75	281,003	257,560	555	98,752	38	131,945	51	65	86
Pittsfield	143.1	0.0594	2.62	100,981	92,066	221	26,175	28	58,519	64	88	85
Springfield	586.1	0.2434	2.75	395,988	360,659	695	105,743	29	216,875	60	102	91
Worcester - Fitchburg - Leominster	662.9	0.2752	2.74	399,326	370,677	755	99,007	27	220,509	59	113	95
Non-Metro Portion of State	259.3	0.1076	2.46	325,696	304,950	697	67,849	22	224,078	73	146	65
State Total	**5,847.4**	**2.4279**	**2.70**	**4,915,469**	**4,580,301**	**7,597**	**1,243,844**	**27**	**2,683,405**	**59**	**129**	**105**
MICHIGAN												
Ann Arbor	271.7	0.1128	2.76	169,185	159,119	317	62,032	39	81,380	51	138	126
Battle Creek	138.1	0.0573	2.68	71,576	65,374	180	25,487	39	33,433	51	115	87
Benton Harbor	166.0	0.0689	2.73	72,599	66,388	208	25,883	39	33,952	51	106	75
Detroit	4,361.0	1.8107	2.76	2,377,667	2,186,337	4,623	823,008	38	1,117,808	51	104	101
Flint	440.0	0.1827	2.78	250,645	221,018	449	96,360	44	100,655	46	111	106
Grand Rapids	633.1	0.2628	2.80	338,679	311,282	666	107,305	34	169,448	54	119	113
Jackson	148.0	0.0615	2.88	63,717	57,871	153	22,563	39	29,597	51	107	93
Kalamazoo	216.9	0.0900	2.72	137,676	130,950	275	52,367	40	62,748	48	154	101
Lansing - East Lansing	427.8	0.1777	2.84	229,712	210,317	429	94,721	45	98,685	47	106	113
Muskegon	155.8	0.0647	2.79	69,454	62,581	175	24,397	39	32,006	51	99	87
Saginaw - Bay City - Midland	416.9	0.1730	2.86	226,402	204,519	398	79,514	39	106,082	52	102	105
Non-Metro Portion of State	1,836.6	0.7630	2.82	639,189	554,837	2,232	217,526	39	304,702	55	69	64
State Total	**9,211.9**	**3.8251**	**2.78**	**4,646,501**	**4,230,593**	**10,105**	**1,631,163**	**39**	**2,170,496**	**51**	**101**	**94**
MINNESOTA												
Duluth	258.3	0.1072	2.64	135,877	115,238	358	37,452	32	71,194	62	85	70
Fargo - Moorhead	148.2	0.0616	2.73	89,024	77,272	192	29,888	39	42,686	55	115	95
Minneapolis - St. Paul	2,254.5	0.9360	2.67	1,380,214	1,258,259	2,471	413,736	33	726,353	58	102	128
Rochester	96.6	0.0401	2.71	57,977	54,343	109	18,177	33	31,847	59	89	152
St. Cloud	177.2	0.0736	3.19	74,132	63,604	170	21,325	34	37,364	59	79	88
Non-Metro Portion of State	1,478.6	0.6140	2.78	566,873	500,233	1,960	166,543	33	304,708	61	70	59
State Total	**4,224.3**	**1.7540**	**2.73**	**2,191,748**	**1,974,551**	**5,011**	**649,165**	**33**	**1,162,282**	**59**	**89**	**97**

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RGI METRO REPORT

STATE Metro Name	12/31/85 Population (Thous.)	% Of U.S.	Average Household Size	1985 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Units	Fast Food Sales ($000)	Market Share (%)	Restaurant Sales ($000)	Market Share (%)	RAI	RGI
MISSISSIPPI												
Biloxi - Gulfport	198.7	0.0825	2.82	123,247	116,236	244	62,081	53	42,104	36	130	100
Jackson	394.3	0.1636	2.83	165,659	163,107	370	82,252	50	60,341	37	92	117
Pascagoula	125.4	0.0521	2.94	48,935	46,414	104	24,789	53	16,812	36	69	125
Non-Metro Portion of State	1,868.0	0.7757	2.90	451,929	439,101	1,479	243,297	55	144,805	33	54	94
State Total	**2,647.3**	**1.0992**	**2.89**	**799,540**	**774,628**	**2,233**	**418,699**	**54**	**266,891**	**34**	**66**	**101**
MISSOURI												
Columbia	108.8	0.0452	2.79	52,337	49,738	125	22,217	45	21,841	44	91	105
Joplin	134.3	0.0558	2.67	64,072	61,363	180	27,412	45	26,948	44	79	68
Kansas City	1,497.5	0.6216	2.67	874,566	839,015	1,777	377,334	45	381,909	46	101	110
St. Joseph	86.7	0.0360	2.70	44,543	41,194	114	18,400	45	18,091	44	71	85
St. Louis	2,416.7	1.0034	2.77	1,347,553	1,248,137	2,601	575,571	46	504,486	40	91	110
Springfield	224.1	0.0930	2.66	123,157	115,520	282	54,201	47	44,877	39	88	96
Non-Metro Portion of State	1,777.0	0.7380	2.78	514,137	485,122	2,118	228,603	47	218,095	45	60	62
State Total	**5,093.8**	**2.1151**	**2.74**	**2,510,812**	**2,372,749**	**6,026**	**1,056,987**	**45**	**1,032,513**	**44**	**86**	**94**
MONTANA												
Billings	122.5	0.0509	2.53	87,399	72,914	190	26,221	36	42,548	58	90	85
Great Falls	80.7	0.0335	2.55	45,510	37,072	129	13,331	36	21,634	58	95	70
Non-Metro Portion of State	533.5	0.2630	2.62	331,939	255,599	1,030	88,637	35	155,348	61	70	66
State Total	**836.7**	**0.3474**	**2.60**	**464,848**	**365,585**	**1,349**	**128,189**	**35**	**219,530**	**60**	**75**	**69**
NEBRASKA												
Lincoln	206.4	0.0857	2.59	120,598	107,777	257	45,291	42	54,819	51	117	99
Omaha	612.4	0.2543	2.68	368,981	327,439	727	137,214	42	166,635	51	103	102
Non-Metro Portion of State	873.1	0.3626	2.67	364,698	307,714	1,268	124,842	41	160,793	52	80	81
State Total	**1,622.4**	**0.6737**	**2.66**	**820,818**	**713,363**	**2,172**	**293,614**	**41**	**368,551**	**52**	**95**	**79**
NEVADA												
Las Vegas	554.2	0.2301	2.48	418,583	369,335	610	127,867	35	187,927	51	101	665
Reno	217.4	0.0902	2.35	170,229	156,557	290	53,466	34	91,580	58	95	422
Non-Metro Portion of State	169.3	0.0703	2.53	94,858	80,927	222	28,003	35	44,119	55	66	354
State Total	**940.9**	**0.3906**	**2.46**	**683,670**	**606,819**	**1,122**	**209,336**	**34**	**323,626**	**53**	**93**	**541**
NEW HAMPSHIRE												
Manchester - Nashua	301.9	0.1254	2.74	206,717	202,486	388	61,486	30	121,158	60	100	112
Portsmouth - Dover - Rochester	310.5	0.1289	2.76	203,068	196,826	436	56,083	28	123,519	63	91	83
Non-Metro Portion of State	388.3	0.1613	2.66	236,249	232,761	647	66,322	28	146,065	63	75	79
State Total	**1,000.7**	**0.4156**	**2.72**	**646,034**	**632,073**	**1,471**	**183,891**	**29**	**390,742**	**62**	**86**	**89**
NEW JERSEY												
Atlantic City	305.1	0.1266	2.57	320,495	280,561	736	85,220	30	166,140	59	134	400
Bergen - Passaic	1,293.4	0.5371	2.71	909,171	826,595	1,505	214,792	26	466,194	56	100	106
Jersey City	552.9	0.2296	2.60	203,240	163,000	529	54,718	34	87,809	54	54	103
Middlesex - Somerset - Hunterdon	934.3	0.3878	2.86	525,127	446,698	976	133,756	30	254,857	57	75	116
Monmouth - Ocean	946.2	0.3929	2.67	555,951	478,059	1,178	147,848	31	286,799	60	85	78
Newark	1,880.9	0.7811	2.78	1,023,910	891,050	1,926	257,436	29	452,065	51	84	121
Trenton	312.9	0.1300	2.80	189,234	164,942	363	49,392	30	90,089	55	89	113
Vineland - Millville - Bridgeton	138.4	0.0575	2.91	47,605	40,202	136	12,311	31	22,145	55	50	91
State Total	**7,618.9**	**3.1635**	**2.76**	**4,389,237**	**3,834,059**	**8,436**	**1,158,695**	**30**	**2,106,589**	**55**	**87**	**133**

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RGI METRO REPORT

STATE Metro Name	12/31/85 Population (Thous.)	% Of U.S.	Average Household Size	1985 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Eating Place Units	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
NEW MEXICO												
Albuquerque	470.2	0.1953	2.64	305,335	288,352	647	116,436	40	136,152	47	114	95
Las Cruces	115.9	0.0482	2.94	52,210	49,090	125	20,855	42	23,262	47	110	83
Santa Fe	103.8	0.0431	2.65	67,317	64,812	167	28,902	45	30,799	48	112	91
Non-Metro Portion of State	785.8	0.3262	2.94	351,088	317,893	941	140,782	44	152,101	48	74	77
State Total	**1,475.7**	**0.6128**	**2.82**	**775,950**	**720,147**	**1,880**	**306,975**	**43**	**342,314**	**48**	**92**	**85**
NEW YORK												
Albany - Schenectady - Troy	861.3	0.3576	2.68	406,264	370,654	1,138	121,011	33	213,918	58	74	86
Binghamton	269.5	0.1119	2.73	127,154	113,042	277	39,817	35	65,401	58	77	110
Buffalo	982.7	0.4080	2.72	557,758	493,075	1,312	169,915	34	250,499	51	86	78
Elmira	95.7	0.0397	2.77	44,693	39,999	95	11,104	28	22,342	56	91	95
Glens Falls	114.7	0.0476	2.87	63,356	58,209	234	16,159	28	32,515	56	81	62
Nassau - Suffolk	2,701.0	1.1215	3.09	1,569,649	1,455,471	3,234	416,632	29	779,839	54	85	88
New York	8,431.8	3.5011	2.52	5,491,809	5,179,071	10,131	1,207,048	23	3,009,716	58	144	107
Niagara Falls	218.6	0.0907	2.73	96,657	86,856	308	31,440	36	41,166	47	76	76
Orange County	279.2	0.1159	3.03	101,299	93,311	329	32,968	35	51,640	55	57	75
Poughkeepsie	258.8	0.1075	2.95	108,760	99,346	296	27,583	28	55,492	56	68	97
Rochester	1,001.1	0.4158	2.73	560,592	516,048	1,186	164,086	32	286,041	55	99	98
Syracuse	663.5	0.2755	2.79	334,914	297,693	772	96,141	32	166,501	56	80	97
Utica - Rome	323.1	0.1342	2.79	134,772	124,523	408	40,863	33	66,212	53	74	72
Non-Metro Portion of State	1,765.2	0.7330	2.85	704,765	621,687	2,137	227,949	37	329,716	53	76	85
State Total	**17,966.2**	**7.4600**	**2.69**	**10,302,442**	**9,548,985**	**21,857**	**2,602,716**	**27**	**5,370,998**	**56**	**107**	**96**
NORTH CAROLINA												
Asheville	168.0	0.0697	2.54	103,558	100,582	213	52,914	53	38,215	38	103	104
Burlington	100.5	0.0417	2.63	61,140	60,542	119	31,847	53	23,001	38	95	98
Charlotte - Gastonia - Rock Hill	1,049.0	0.4357	2.71	536,856	524,006	1,180	281,792	54	194,523	37	81	108
Fayetteville	263.7	0.1095	3.14	119,972	114,248	264	60,100	53	43,407	38	102	94
Greensboro - Winston-Salem - High Point	902.1	0.3745	2.64	506,459	497,357	1,056	236,493	48	184,330	37	108	100
Hickory	217.2	0.0902	2.73	100,584	99,541	242	53,084	53	37,795	38	86	103
Jacksonville	121.4	0.0504	3.49	49,003	42,643	119	22,432	53	16,202	38	91	72
Raleigh - Durham	632.9	0.2628	2.66	372,928	363,297	771	176,591	49	142,605	39	106	114
Wilmington	113.3	0.0470	2.62	79,308	77,230	189	40,627	53	29,342	38	112	74
Non-Metro Portion of State	2,856.0	1.1859	2.78	999,122	983,098	2,947	546,330	56	373,052	38	73	87
State Total	**6,304.9**	**2.6179**	**2.74**	**2,871,549**	**2,806,662**	**6,997**	**1,473,501**	**53**	**1,061,856**	**38**	**87**	**96**
NORTH DAKOTA												
Bismarck	91.7	0.0381	2.83	48,104	44,048	101	17,906	41	23,772	54	108	135
Fargo - Moorhead	148.2	0.0616	2.73	89,024	77,272	192	29,888	39	42,686	55	115	95
Grand Forks	70.5	0.0292	2.97	29,544	24,831	81	10,095	41	13,402	54	98	105
Non-Metro Portion of State	438.9	0.1823	2.84	164,952	130,415	602	48,426	37	74,085	57	69	65
State Total	**699.9**	**0.2906**	**2.83**	**305,831**	**255,396**	**912**	**99,233**	**39**	**141,538**	**55**	**87**	**82**
OHIO												
Akron	648.4	0.2692	2.69	369,483	343,134	735	132,619	39	188,878	55	99	95
Canton	409.5	0.1700	2.76	206,941	191,469	498	81,021	42	100,329	52	87	81
Cincinnati	1,405.7	0.5838	2.69	895,989	820,859	1,655	333,954	41	398,248	49	111	105
Cleveland	1,873.4	0.7779	2.62	1,137,990	1,042,307	2,088	397,220	38	538,078	52	98	101
Columbus	1,288.9	0.5353	2.64	810,818	754,210	1,590	359,389	48	325,417	43	111	101
Dayton - Springfield	927.5	0.3851	2.63	517,758	479,447	1,094	235,138	49	196,036	41	101	97
Hamilton - Middletown	273.6	0.1136	2.83	119,471	109,015	256	48,218	44	50,639	46	88	96
Lima	157.4	0.0655	2.79	83,495	78,236	210	34,604	44	36,339	46	102	79
Lorain - Elyria	273.8	0.1137	2.87	107,194	94,243	252	41,682	44	43,776	46	71	102

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RGI METRO REPORT

STATE Metro Name	12/31/85 Population (Thous.)	% Of U.S.	Average Household Size	Eating & Drinking Place Sales ($000)	1985 Eating Place Sales ($000)	Eating Place Units	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Mansfield	130.9	0.0544	2.70	65,213	59,640	167	26,378	44	27,703	46	97	80
Parkersburg - Marietta	159.0	0.0660	2.69	75,311	68,918	176	34,682	50	27,924	41	91	89
Steubenville - Weirton	156.5	0.0650	2.69	57,722	51,271	184	25,522	50	21,045	41	64	76
Toledo	617.9	0.2566	2.69	439,960	404,717	750	153,052	38	208,722	52	107	93
Youngstown - Warren	516.2	0.2143	2.71	244,167	220,134	573	104,033	47	95,932	44	89	83
Non-Metro Portion of State	2,321.0	0.9635	2.79	796,607	744,839	2,652	345,492	46	313,969	42	75	72
State Total	**10,836.0**	**4.4994**	**2.70**	**5,731,934**	**5,278,643**	**12,505**	**2,264,402**	**43**	**2,495,816**	**47**	**96**	**91**
OKLAHOMA												
Enid	65.8	0.0273	2.57	42,791	40,822	104	19,989	49	15,315	38	101	68
Lawton	117.1	0.0487	3.07	63,422	59,943	122	29,352	49	22,489	38	101	90
Oklahoma City	984.4	0.4089	2.61	823,628	797,906	1,446	369,227	46	314,040	39	134	86
Tulsa	745.3	0.3095	2.61	460,789	447,864	955	222,195	50	161,542	36	111	92
Non-Metro Portion of State	1,407.8	0.5843	2.66	517,783	507,657	1,658	257,603	51	189,516	37	71	68
State Total	**3,356.0**	**1.3935**	**2.64**	**1,913,125**	**1,858,834**	**4,317**	**900,640**	**48**	**704,643**	**38**	**102**	**80**
OREGON												
Eugene - Springfield	267.9	0.1112	2.57	146,782	136,173	383	61,202	45	66,104	49	109	75
Medford	139.3	0.0578	2.65	64,339	59,176	200	21,747	37	32,743	55	103	63
Portland	1,149.3	0.4770	2.55	780,655	712,303	1,600	237,864	33	410,749	58	132	94
Salem	257.0	0.1068	2.72	123,224	113,422	346	46,777	41	55,020	49	116	61
Non-Metro Portion of State	895.7	0.3721	2.68	447,421	412,883	1,489	157,960	38	230,394	56	94	56
State Total	**2,709.2**	**1.1249**	**2.61**	**1,562,421**	**1,433,957**	**4,018**	**525,550**	**37**	**795,010**	**55**	**114**	**74**
PENNSYLVANIA												
Allentown - Bethlehem	656.8	0.2727	2.63	321,751	297,938	732	105,611	35	147,350	49	89	95
Altoona	136.0	0.0565	2.67	51,294	46,619	141	17,137	37	23,649	51	65	86
Beaver County	199.9	0.0830	2.72	61,015	50,600	151	22,468	44	24,465	48	50	119
Erie	285.3	0.1184	2.76	135,421	121,029	291	52,790	44	57,104	47	88	102
Harrisburg - Lebanon - Carlisle	578.8	0.2404	2.62	310,936	281,819	656	109,446	39	140,648	50	80	115
Johnstown	262.6	0.1091	2.74	70,008	60,860	244	28,489	47	28,964	48	56	80
Lancaster	386.6	0.1606	2.79	202,749	187,547	411	62,416	33	115,715	62	89	116
Philadelphia	4,807.8	1.9962	2.74	2,634,142	2,339,525	4,689	811,508	35	1,168,285	50	97	115
Pittsburgh	2,180.6	0.9054	2.58	1,163,278	1,039,010	2,289	353,354	34	548,768	53	97	100
Reading	323.4	0.1343	2.60	174,013	159,945	407	59,847	37	90,220	56	97	85
Scranton - Wilkes-Barre	735.6	0.3054	2.64	334,122	308,628	901	112,627	36	149,736	49	86	91
Sharon	128.6	0.0534	2.74	52,543	46,555	145	17,116	37	23,617	51	85	72
State College	115.8	0.0480	2.97	59,688	57,198	130	21,026	37	29,017	51	118	82
Williamsport	119.3	0.0495	2.71	45,795	39,187	135	14,406	37	19,880	51	62	86
York	401.1	0.1666	2.68	162,676	148,433	425	58,102	39	74,667	50	84	101
Non-Metro Portion of State	1,880.4	0.7808	2.73	597,971	534,825	1,863	213,746	40	247,020	46	70	70
State Total	**12,012.0**	**4.9877**	**2.67**	**5,783,200**	**5,194,029**	**12,573**	**1,864,767**	**36**	**2,617,342**	**50**	**89**	**99**
RHODE ISLAND												
Providence - Pawtucket - Woonsocket	885.2	0.3676	2.74	501,621	457,754	1,176	144,237	32	266,557	58	96	82
Non-Metro Portion of State	84.3	0.0350	2.83	94,052	87,853	154	23,685	27	55,438	63	228	81
State Total	**969.5**	**0.4026**	**2.75**	**595,673**	**545,607**	**1,330**	**167,922**	**31**	**321,995**	**59**	**106**	**82**
SOUTH CAROLINA												
Anderson	145.3	0.0603	2.69	51,068	50,889	157	26,145	51	18,776	37	74	86
Charleston	490.2	0.2036	2.96	252,453	242,088	435	118,191	49	82,272	34	102	131
Charlotte - Gastonia - Rock Hill	1,049.0	0.4357	2.71	536,856	524,006	1,180	281,792	54	194,523	37	81	108

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RGI METRO REPORT

STATE Metro Name	12/31/85 Population (Thous.)	% Of U.S.	Average Household Size	1985 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Units	Fast Food Sales ($000)	Market Share (%)	Restaurant Sales ($000)	Market Share (%)	RAI	RGI
Columbia	443.2	0.1841	2.81	234,950	229,410	465	120,763	53	79,681	35	120	111
Florence	118.3	0.0491	2.87	47,810	47,281	126	24,293	51	17,441	37	78	109
Greenville - Spartanburg	609.1	0.2528	2.69	290,731	284,608	719	159,365	56	96,125	34	88	92
Non-Metro Portion of State	1,356.0	0.5631	2.88	538,310	519,062	1,335	237,991	45	226,474	44	82	110
State Total	**3,396.3**	**1.4102**	**2.83**	**1,507,114**	**1,463,198**	**3,434**	**728,763**	**50**	**551,347**	**38**	**89**	**108**
SOUTH DAKOTA												
Rapid City	76.3	0.0317	2.66	51,128	47,409	134	15,557	33	28,367	60	102	80
Sioux Falls	122.2	0.0508	2.58	70,148	61,447	146	21,356	35	35,941	58	100	111
Non-Metro Portion of State	520.8	0.2162	2.77	191,638	159,612	753	53,113	33	96,718	61	74	59
State Total	**719.3**	**0.2987**	**2.72**	**312,914**	**268,468**	**1,033**	**90,026**	**34**	**161,026**	**60**	**83**	**69**
TENNESSEE												
Chattanooga	433.7	0.1800	2.70	199,775	195,408	478	98,346	50	81,793	42	76	95
Clarksville - Hopkinsville	154.4	0.0641	3.02	64,678	59,848	158	30,123	50	23,790	40	99	81
Jackson	77.1	0.0320	2.67	44,751	43,010	88	21,290	50	18,332	43	103	104
Johnson City - Kingsport - Bristol	449.0	0.1863	2.70	179,654	176,559	411	104,970	59	50,315	28	78	99
Knoxville	599.0	0.2488	2.61	454,722	439,980	710	201,683	46	192,691	44	117	117
Memphis	932.8	0.3872	2.81	472,153	459,171	978	235,505	51	165,118	36	90	114
Nashville	910.7	0.3781	2.70	535,594	522,969	1,034	212,529	41	255,795	49	111	116
Non-Metro Portion of State	1,617.3	0.6718	2.75	404,460	394,125	1,399	196,229	50	168,871	43	58	91
State Total	**4,793.2**	**1.9902**	**2.72**	**2,247,416**	**2,184,400**	**4,952**	**1,036,140**	**47**	**925,218**	**42**	**90**	**105**
TEXAS												
Abilene	121.1	0.0503	2.81	98,349	92,882	160	40,752	44	38,710	42	113	85
Amarillo	196.6	0.0816	2.64	140,796	131,578	298	57,728	44	54,835	42	114	82
Austin	690.1	0.2866	2.63	518,333	473,584	984	203,705	43	211,711	45	127	99
Beaumont - Port Arthur	394.7	0.1639	2.81	206,039	188,030	394	82,040	44	79,834	42	85	106
Brazoria	204.6	0.0850	3.07	69,803	66,654	191	35,630	53	23,568	35	56	113
Brownsville - Harlingen	242.5	0.1007	3.51	123,976	115,589	266	50,714	44	48,172	42	82	80
Bryan - College Station	112.7	0.0468	2.78	89,311	81,619	158	35,812	44	34,015	42	113	69
Corpus Christi	363.4	0.1509	3.05	231,594	206,919	479	96,123	46	87,100	42	91	86
Dallas	2,296.0	0.9532	2.68	1,816,924	1,709,660	2,779	689,849	40	748,231	44	128	136
El Paso	545.5	0.2265	3.36	261,016	229,071	523	104,462	46	89,069	39	107	100
Fort Worth - Arlington	1,175.5	0.4880	2.72	780,059	728,126	1,378	332,348	46	288,533	40	103	108
Galveston - Texas City	218.1	0.0905	2.77	139,879	132,921	252	58,320	44	55,394	42	89	103
Houston	3,211.0	1.3332	2.75	2,327,638	2,162,103	3,586	839,995	39	984,649	46	111	130
Killeen - Temple	234.0	0.0972	3.12	114,500	112,355	232	49,297	44	46,823	42	109	83
Laredo	118.5	0.0492	3.77	62,065	60,539	98	26,562	44	25,228	42	66	103
Longview - Marshall	171.5	0.0712	2.77	113,086	107,292	237	47,073	44	44,715	42	92	76
Lubbock	221.6	0.0920	2.82	151,704	141,252	306	62,083	44	55,553	39	115	85
McAllen - Edinburg - Mission	345.9	0.1436	3.67	124,128	116,473	276	48,185	41	41,069	35	78	83
Midland	112.3	0.0466	2.74	96,751	88,803	144	38,964	44	37,009	42	94	94
Odessa	140.1	0.0582	2.76	143,794	128,296	176	56,288	44	53,469	42	114	91
San Angelo	96.4	0.0400	2.75	69,356	65,488	127	28,733	44	27,294	42	106	75
San Antonio	1,209.2	0.5020	2.98	788,066	727,990	1,443	308,056	42	286,940	39	112	101
Sherman - Denison	96.5	0.0400	2.61	46,649	45,240	113	19,850	44	18,853	42	93	75
Texarkana	120.7	0.0501	2.73	61,652	59,868	138	28,314	47	23,801	40	90	84
Tyler	151.9	0.0630	2.74	73,626	73,445	160	32,225	44	30,608	42	99	85

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RGI METRO REPORT

STATE Metro Name	12/31/85 Population (Thous.)	% Of U.S.	Average House-hold Size	1985 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Units	Fast Food Sales ($000)	Market Share (%)	Restaurant Sales ($000)	Market Share (%)	RAI	RGI
Victoria	77.7	0.0323	2.93	47,452	41,637	99	18,269	44	17,352	42	82	74
Waco	187.7	0.0779	2.72	110,133	102,227	230	44,851	44	42,605	42	96	85
Wichita Falls	124.8	0.0519	2.76	81,010	76,226	176	33,444	44	31,767	42	113	81
Non-Metro Portion of State	3,267.4	1.3572	2.82	1,056,226	1,017,737	3,602	538,425	53	406,132	40	62	62
State Total	**16,408.7**	**6.8133**	**2.82**	**9,925,958**	**9,267,154**	**18,961**	**3,998,833**	**43**	**3,927,330**	**42**	**100**	**101**
UTAH												
Provo - Orem	255.9	0.1062	3.72	55,976	54,583	196	24,843	46	26,036	48	63	94
Salt Lake City - Ogden	1,044.2	0.4337	3.10	409,249	395,643	986	180,890	46	182,373	46	80	116
Non-Metro Portion of State	398.7	0.1655	3.32	132,074	126,323	462	50,863	40	71,853	57	67	83
State Total	**1,698.8**	**0.7054**	**3.24**	**597,299**	**576,549**	**1,644**	**256,596**	**45**	**280,262**	**49**	**75**	**104**
VERMONT												
Burlington	127.8	0.0530	2.81	98,046	93,066	182	25,270	27	57,603	62	111	106
Non-Metro Portion of State	410.0	0.1703	2.69	236,492	217,344	674	59,225	27	134,940	62	83	76
State Total	**537.8**	**0.2233**	**2.71**	**334,538**	**310,410**	**856**	**84,495**	**27**	**192,543**	**62**	**90**	**83**
VIRGINIA												
Charlottesville	121.6	0.0506	2.67	63,908	62,420	153	28,162	45	26,989	43	82	104
Danville	112.8	0.0469	2.80	40,563	39,986	122	18,026	45	17,283	43	78	90
Lynchburg	145.3	0.0603	2.94	68,805	68,035	177	30,678	45	29,404	43	86	92
Norfolk - Virginia Beach - Newport News	1,288.4	0.5348	2.98	690,893	673,154	1,533	301,713	45	310,652	46	115	103
Richmond - Petersburg	813.0	0.3377	2.80	411,960	405,173	1,039	196,826	49	166,624	41	87	97
Roanoke	226.6	0.0942	2.68	126,583	123,033	294	55,525	45	53,233	43	94	98
Non-Metro Portion of State	1,680.5	0.6975	2.94	514,887	508,298	1,628	256,031	50	183,124	36	64	100
State Total	**5,785.0**	**2.4021**	**2.85**	**2,849,813**	**2,803,152**	**6,415**	**1,231,191**	**44**	**1,226,914**	**44**	**93**	**109**
WASHINGTON												
Bellingham	114.9	0.0477	2.61	74,431	67,610	197	22,848	34	39,174	58	108	60
Bremerton	170.4	0.0708	2.74	76,380	66,065	130	22,327	34	38,280	58	94	108
Olympia	143.1	0.0594	2.58	78,749	73,411	182	24,810	34	42,535	58	91	76
Richland - Kennewick - Pasco	143.9	0.0598	2.81	69,307	61,692	180	20,850	34	35,744	58	77	96
Seattle	1,719.7	0.7140	2.51	1,340,276	1,254,361	2,370	381,979	30	720,272	57	127	103
Spokane	357.9	0.1486	2.56	212,006	197,763	437	76,872	39	106,556	54	103	88
Tacoma	521.9	0.2167	2.65	279,566	256,386	526	95,256	37	148,111	58	109	86
Vancouver	211.7	0.0879	2.69	97,066	85,766	221	35,385	41	46,395	54	100	87
Yakima	181.7	0.0754	2.71	83,057	75,054	226	25,364	34	43,489	58	81	72
Non-Metro Portion of State	851.5	0.3536	2.60	412,553	366,490	1,225	128,234	35	229,865	63	77	65
State Total	**4,416.7**	**1.8339**	**2.58**	**2,723,391**	**2,504,598**	**5,694**	**833,925**	**33**	**1,450,421**	**58**	**106**	**88**
WEST VIRGINIA												
Charleston	268.7	0.1116	2.55	114,672	110,406	290	59,818	54	40,587	37	74	97
Huntington - Ashland	339.8	0.1409	2.72	138,951	134,076	313	86,958	65	36,116	27	87	91
Parkersburg - Marietta	159.0	0.0660	2.69	75,311	68,918	176	34,682	50	27,924	41	91	89
Steubenville - Weirton	156.5	0.0650	2.69	57,722	51,271	184	25,522	50	21,045	41	64	76
Wheeling	181.9	0.0756	2.61	77,419	69,765	178	34,696	50	28,666	41	73	88
Non-Metro Portion of State	1,256.5	0.5217	2.75	319,998	307,971	1,069	172,687	56	111,282	36	54	91
State Total	**1,967.9**	**0.8171**	**2.69**	**646,292**	**616,468**	**1,835**	**349,143**	**57**	**215,960**	**35**	**66**	**91**
WISCONSIN												
Appleton - Oshkosh - Neenah	300.8	0.1249	2.76	144,883	122,197	361	46,599	38	63,446	52	102	96

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REGION State	12/31/85 Population (Thous.)	% Of U.S.	Average House-hold Size	1985 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Eating Place Units	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Eau Claire	137.8	0.0572	2.80	70,777	57,620	156	19,913	35	33,996	59	105	86
Green Bay	183.2	0.0760	2.73	109,194	94,950	245	32,737	34	55,900	59	148	89
Janesville - Beloit	139.5	0.0579	2.70	72,874	59,509	181	20,516	34	35,035	59	90	75
Kenosha	122.5	0.0509	2.78	67,371	54,283	131	18,717	34	31,955	59	81	89
La Crosse	93.6	0.0389	2.71	59,076	49,492	141	17,063	34	29,138	59	110	89
Madison	336.7	0.1398	2.54	254,205	218,667	450	79,079	36	130,937	60	139	107
Milwaukee	1,401.0	0.5818	2.65	792,842	687,936	1,628	242,825	35	388,339	56	103	101
Racine	174.2	0.0723	2.77	77,189	66,758	209	23,017	34	39,301	59	84	82
Sheboygan	101.6	0.0421	2.74	41,730	34,902	121	12,035	34	20,546	59	85	85
Wausau	114.9	0.0477	2.80	36,649	31,672	124	10,920	34	18,644	59	71	82
Non-Metro Portion of State	1,621.9	0.6736	2.75	707,723	579,170	2,287	168,017	29	382,282	66	87	63
State Total	**4,818.0**	**2.0006**	**2.71**	**2,483,631**	**2,095,452**	**6,155**	**706,588**	**34**	**1,251,030**	**60**	**100**	**83**
WYOMING												
Casper	76.4	0.0317	2.65	46,188	41,343	97	16,502	40	21,810	53	80	122
Cheyenne	73.6	0.0306	2.59	47,753	43,645	99	16,846	39	22,820	52	122	104
Non-Metro Portion of State	366.4	0.1521	2.77	248,044	204,080	530	79,691	39	107,925	53	82	104
State Total	**516.4**	**0.2144**	**2.73**	**341,985**	**289,068**	**726**	**113,039**	**39**	**152,555**	**53**	**86**	**106**
United States Total	**240,833.5**	**100.0000**	**2.72**	**134,212,509**	**124,787,468**	**282,595**	**47,923,392**	**38**	**62,453,155**	**50**	**100**	**100**

SALES BY AREA OF DOMINANT INFLUENCE (ADI)

Covers 214 major Areas of Dominant Influence for a TV signal.

ADI Name	12/31/85 Population (Thous.)	% Of U.S.	Average House-hold Size	1985 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Eating Place Units	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Abilene - Sweetwater	313.8	0.1302	2.70	169,953	161,102	406	76,299	47	66,101	41	87	65
Albany, Ga.	396.2	0.1646	2.95	140,908	136,434	356	76,542	56	48,286	35	74	102
Albany - Schenectady - Troy	1,314.3	0.5457	2.70	641,607	586,204	1,832	184,877	32	341,856	58	75	81
Albuquerque	1,123.0	0.4666	2.83	582,621	542,819	1,471	224,832	41	262,443	48	94	85
Alexandria, La.	267.6	0.1111	2.99	81,679	77,106	190	32,415	42	25,963	34	76	107
Alexandria, Minn.	167.1	0.0693	2.79	55,934	51,663	221	17,192	33	31,468	61	65	58
Alpena	31.5	0.0131	2.76	10,124	8,129	28	3,136	39	4,574	56	52	99
Amarillo	480.7	0.1996	2.72	251,833	238,104	651	112,339	47	98,734	41	86	73
Ardmore - Ada	188.9	0.0784	2.65	67,888	66,437	211	33,730	51	24,804	37	78	70
Atlanta	3,314.4	1.3763	2.75	2,118,849	2,022,396	3,730	974,889	48	793,880	39	121	120
Augusta	624.6	0.2594	2.89	200,496	193,318	514	105,632	55	61,079	32	71	110
Austin, Tex.	844.2	0.3505	2.64	594,777	545,494	1,201	241,654	44	240,357	44	118	90
Bakersfield	475.8	0.1976	2.81	278,631	263,938	554	112,089	42	135,730	51	99	91
Baltimore	2,457.7	1.0206	2.77	1,411,160	1,264,986	2,476	519,333	41	543,222	43	103	114
Bangor	348.8	0.1448	2.77	156,312	153,619	491	58,038	38	83,339	54	74	70
Baton Rouge	768.0	0.3188	2.99	368,789	342,987	647	175,087	51	109,560	32	83	123
Beaumont - Port Arthur	475.6	0.1973	2.79	218,818	200,809	456	88,871	44	84,984	42	79	102
Bend	69.2	0.0287	2.68	34,589	32,580	123	12,449	38	18,159	56	94	59
Billings - Hardin	230.4	0.0958	2.58	140,093	113,487	340	40,792	36	66,543	59	78	86
Biloxi - Gulfport - Pascagoula	179.4	0.0746	2.83	117,112	111,073	222	59,374	53	40,266	36	144	103

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ADI REPORT

ADI Name	12/31/85 Population (Thous.)	% Of U.S.	Average House-hold Size	Eating & Drinking Place Sales ($000)	1985 Eating Place Sales ($000)	Eating Place Units	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Binghamton	435.3	0.1807	2.76	174,091	154,832	438	55,517	36	86,683	56	68	100
Birmingham	1,500.4	0.6229	2.71	489,964	475,395	1,286	261,017	55	155,137	33	74	101
Bluefield - Beckley - Oak Hill	410.2	0.1704	2.78	107,714	105,845	332	58,369	55	38,046	36	51	99
Boise	436.5	0.1812	2.82	220,916	201,324	562	77,505	38	109,257	54	90	88
Boston	5,519.4	2.2920	2.70	4,705,503	4,424,345	7,346	1,174,470	27	2,617,593	59	134	107
Bowling Green	105.9	0.0440	2.79	57,926	55,108	129	34,082	62	17,463	32	105	82
Bristol - Kingsport - Johnson City	805.1	0.3343	2.79	256,020	251,283	671	143,409	57	78,678	31	68	103
Buffalo	1,707.0	0.7086	2.76	848,981	750,295	2,196	264,250	35	381,002	51	82	77
Burlington - Plattsburgh	695.1	0.2884	2.79	385,743	356,163	1,022	103,359	29	215,862	61	80	83
Butte	129.9	0.0538	2.64	74,151	56,929	230	19,714	35	34,553	61	81	68
Casper - Riverton	155.8	0.0646	2.75	90,721	78,130	214	30,962	40	41,383	53	76	99
Cedar Rapids - Waterloo - Dubuque	888.2	0.3685	2.71	357,046	308,113	1,174	129,749	42	153,066	50	77	71
Charleston, S.C.	612.5	0.2544	2.96	302,015	291,530	548	140,333	48	103,804	36	98	124
Charleston - Huntington	1,443.3	0.5992	2.77	461,620	441,376	1,278	249,624	57	152,730	35	68	88
Charlotte	1,802.0	0.7484	2.73	818,227	801,653	1,958	430,781	54	301,441	38	78	103
Charlottesville	101.7	0.0422	2.63	62,953	61,465	146	27,713	45	26,565	43	87	100
Chattanooga	828.8	0.3440	2.75	319,076	313,553	829	163,127	52	126,647	40	68	98
Cheyenne - Scottsbluff	119.6	0.0496	2.62	67,967	61,996	162	24,212	39	32,316	52	97	88
Chicago	8,613.3	3.5766	2.79	4,554,233	4,242,913	9,736	1,567,164	37	2,212,031	52	112	104
Chico - Redding	389.8	0.1619	2.57	197,256	184,512	542	65,934	36	105,856	57	76	66
Cincinnati	1,961.7	0.8147	2.73	1,078,857	988,631	2,161	413,868	42	470,993	48	101	100
Clarksburg - Weston	230.1	0.0956	2.70	68,344	65,783	231	36,951	56	23,800	36	67	78
Cleveland	3,842.1	1.5953	2.69	2,081,787	1,910,589	4,317	762,849	40	973,115	51	93	94
Colorado Springs - Pueblo	577.0	0.2395	2.67	315,642	288,047	738	113,184	39	140,911	49	99	86
Columbia, S.C.	782.2	0.3249	2.86	324,008	317,275	731	160,268	51	118,080	37	102	109
Columbia - Jefferson City	425.6	0.1769	2.83	167,727	159,153	498	73,674	46	70,941	45	77	83
Columbus, Ga.	499.3	0.2074	2.88	174,022	167,234	415	93,746	56	57,678	34	87	104
Columbus - Tupelo	444.9	0.1849	2.86	90,290	87,082	358	48,652	56	28,698	33	45	93
Columbus, Ohio	1,743.1	0.7240	2.67	951,373	888,305	2,070	422,271	48	381,127	43	103	95
Corpus Christi	532.2	0.2211	3.06	306,694	279,140	699	134,301	48	115,922	42	83	78
Dallas - Ft. Worth	4,221.4	1.7527	2.69	2,848,957	2,681,697	4,947	1,147,825	43	1,134,391	42	112	117
Davenport - Rock Island - Moline	879.6	0.3652	2.66	387,038	337,468	1,132	156,175	46	150,424	45	85	72
Dayton	1,366.8	0.5675	2.68	668,136	622,352	1,622	304,365	49	254,499	41	94	88
Denver	2,599.6	1.0791	2.54	1,940,459	1,797,919	3,564	554,398	31	1,035,349	58	112	104
Des Moines	979.1	0.4064	2.57	423,372	381,189	1,333	161,790	42	181,894	48	69	75
Detroit	4,674.1	1.9407	2.76	2,554,569	2,352,243	4,975	887,650	38	1,203,002	51	105	102
Dothan	272.5	0.1132	2.78	81,692	80,165	232	48,799	61	25,437	32	67	95
Duluth - Superior	467.0	0.1940	2.67	216,204	181,654	697	58,985	32	112,962	62	77	62
El Centro - Yuma	190.2	0.0789	3.09	86,579	78,512	257	29,123	37	45,320	58	66	69
El Paso	684.7	0.2843	3.27	319,650	283,669	673	128,053	45	114,771	40	104	96
Elmira	241.0	0.1000	2.78	94,650	84,805	265	27,882	33	45,429	54	84	83
Erie	427.7	0.1776	2.75	191,989	169,932	455	72,272	43	79,626	47	86	88
Eugene	426.2	0.1769	2.62	211,714	196,050	649	84,078	43	99,481	51	98	65
Eureka	133.4	0.0554	2.53	77,764	71,530	241	26,112	37	43,355	61	71	64
Evansville	722.0	0.2997	2.71	326,335	302,161	828	160,206	53	116,402	39	77	86
Fargo	599.8	0.2493	2.79	249,429	211,792	798	78,622	37	120,806	57	84	69
Farmington	100.6	0.0417	3.10	43,037	40,284	103	17,960	45	19,139	48	77	90
Flagstaff	88.1	0.0366	3.14	73,781	69,062	142	25,927	38	38,323	55	148	130
Flint - Saginaw - Bay City	1,240.3	0.5149	2.83	605,026	537,011	1,265	221,977	41	266,451	50	96	92
Florence, S.C.	411.1	0.1707	2.85	259,137	244,884	584	112,817	46	103,480	42	109	103

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ADI REPORT

ADI Name	12/31/85 Population (Thous.)	% Of U.S.	Average House-hold Size	1985 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Eating Place Units	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Ft. Myers - Naples	495.3	0.2056	2.38	290,988	276,074	654	101,042	37	157,517	57	88	82
Ft. Smith	391.8	0.1625	2.72	156,442	153,160	483	85,931	56	53,097	35	98	71
Ft. Wayne	627.1	0.2603	2.80	301,088	278,949	770	107,185	38	149,168	53	100	85
Fresno - Visalia	1,196.9	0.4970	2.91	524,073	486,641	1,384	215,602	44	252,398	52	83	80
Gainesville	212.9	0.0885	2.65	122,899	116,438	288	42,616	37	61,902	53	100	84
Glendive	14.3	0.0059	2.60	8,315	7,204	22	2,483	34	4,351	60	73	99
Grand Junction	183.6	0.0763	2.67	104,535	97,644	268	27,847	29	62,960	64	82	101
Grand Rapids - Kalamazoo - Battle Creek	1,648.9	0.6847	2.80	755,794	690,820	1,801	257,028	37	361,998	52	104	94
Great Falls	178.3	0.0741	2.60	88,025	68,501	284	24,327	36	40,905	60	73	66
Green Bay	999.3	0.4149	2.74	453,811	385,729	1,302	130,866	34	227,732	59	98	77
Greensboro - Winston-Salem - High Point	1,341.9	0.5572	2.67	662,561	651,143	1,469	319,667	49	242,569	37	97	100
Greenville - New Bern - Washington	658.5	0.2736	2.90	240,199	228,989	640	126,083	55	86,896	38	77	87
Greenville - Spartanburg - Asheville	1,629.8	0.6763	2.68	675,272	661,385	1,796	357,200	54	241,820	37	80	92
Greenwood - Greenville	257.1	0.1068	3.11	61,303	61,015	212	33,606	55	19,988	33	59	84
Hagerstown	114.1	0.0474	2.82	39,018	32,367	113	13,441	42	14,381	44	64	109
Harrisburg - York - Lancaster - Lebanon	1,434.6	0.5959	2.69	694,291	634,142	1,563	236,489	37	338,569	53	83	109
Harrisonburg	99.7	0.0413	2.96	43,154	41,104	112	20,543	50	14,590	35	81	96
Hartford - New Haven	2,259.2	0.9381	2.73	1,514,236	1,393,456	2,943	453,973	33	758,278	54	103	97
Helena	47.5	0.0198	2.51	31,050	23,892	81	8,230	34	14,424	60	74	73
Houston	3,970.9	1.6489	2.77	2,659,334	2,476,487	4,414	994,556	40	1,109,367	45	104	122
Huntsville - Decatur - Florence	715.1	0.2971	2.70	255,127	247,981	647	140,078	56	84,204	34	86	102
Idaho Falls - Pocatello	323.7	0.1344	3.15	119,408	110,076	347	42,977	39	60,709	55	70	87
Indianapolis	2,273.9	0.9440	2.75	1,275,570	1,194,436	2,736	566,080	47	482,460	40	111	92
Jackson, Miss.	807.5	0.3351	2.87	261,491	255,186	655	133,369	52	90,738	36	72	115
Jackson, Tenn.	123.1	0.0511	2.68	54,845	52,772	136	26,125	50	22,491	43	98	91
Jacksonville	1,143.5	0.4749	2.71	572,834	541,620	1,317	262,405	48	229,571	42	103	112
Johnstown - Altoona	785.9	0.3263	2.76	266,029	238,605	769	96,196	40	115,792	49	69	80
Jonesboro	184.8	0.0766	2.69	65,235	64,708	208	38,775	60	20,353	31	89	70
Joplin - Pittsburg	464.8	0.1932	2.63	156,674	151,145	634	73,903	49	62,344	41	68	60
Kansas City	1,899.5	0.7884	2.68	997,657	955,197	2,246	433,911	45	432,101	45	95	100
Knoxville	1,113.6	0.4621	2.70	599,762	582,749	1,129	278,360	48	248,308	43	97	109
La Crosse - Eau Claire	433.6	0.1802	2.78	212,611	174,117	533	57,342	33	105,945	61	91	77
Lafayette, Ind.	132.6	0.0551	2.87	77,727	71,767	155	33,880	47	30,563	43	128	99
Lafayette, La.	574.8	0.2386	2.93	280,875	262,150	539	109,351	42	85,443	33	86	102
Lake Charles	220.1	0.0914	2.88	85,016	78,990	194	33,841	43	28,659	36	58	105
Lansing	618.5	0.2570	2.86	304,636	278,793	620	121,346	44	134,203	48	103	105
Laredo	126.7	0.0526	3.74	63,896	62,370	108	27,565	44	25,984	42	66	98
Las Vegas	572.6	0.2377	2.48	424,872	373,876	625	129,440	35	190,409	51	100	654
Laurel - Hattiesburg	253.3	0.1053	2.84	83,232	80,466	219	44,370	55	26,402	33	66	94
Lexington	922.4	0.3830	2.80	387,971	375,094	935	208,255	56	135,101	36	92	95
Lima	113.0	0.0470	2.78	65,639	61,659	154	27,271	44	28,640	46	107	81
Lincoln - Hastings - Kearney	677.7	0.2815	2.62	322,937	282,199	958	116,963	41	144,598	51	95	72
Little Rock	1,251.6	0.5199	2.75	486,723	478,150	1,347	265,903	56	163,798	34	85	88
Los Angeles	11,921.7	4.9501	2.77	8,226,426	7,836,520	14,368	2,730,963	35	4,415,288	56	123	104
Louisville	1,413.8	0.5872	2.79	696,090	653,619	1,385	353,652	54	236,287	36	100	106
Lubbock	397.4	0.1650	2.89	193,986	182,474	511	83,871	46	71,985	39	92	71
Macon	462.4	0.1921	2.90	186,231	180,237	437	97,346	54	65,619	36	83	109

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ADI Name	12/31/85 Population (Thous.)	% Of U.S.	Average Household Size	1985 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Eating Place Units	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Madison	549.6	0.2283	2.58	358,931	305,110	782	104,159	34	187,893	62	119	87
Mankato	65.3	0.0271	2.76	33,627	29,120	95	9,796	34	17,143	59	74	63
Marquette	159.3	0.0661	2.84	51,507	41,879	174	15,940	38	23,556	56	59	66
McAllen - Brownsville	641.8	0.2665	3.63	253,889	237,673	576	101,898	43	91,502	38	76	81
Medford	334.8	0.1390	2.63	160,768	147,966	520	55,360	37	83,256	56	91	59
Memphis	1,679.2	0.6971	2.84	625,482	606,054	1,604	316,146	52	217,652	36	75	101
Meridian	213.5	0.0886	2.82	58,142	57,013	173	32,564	57	18,424	32	62	95
Miami	3,001.3	1.2462	2.53	2,119,040	1,984,094	3,890	620,595	31	1,115,892	56	125	111
Milwaukee	1,894.2	0.7864	2.69	1,018,160	880,481	2,265	304,136	35	507,937	58	101	95
Minneapolis - St. Paul	3,267.7	1.3565	2.72	1,797,714	1,613,780	3,750	530,179	33	944,848	59	96	106
Minot - Bismarck - Dickinson	413.5	0.1716	2.87	187,020	149,720	548	56,372	38	84,672	57	77	81
Missoula	199.2	0.0827	2.57	98,607	79,059	326	27,303	35	47,845	61	71	62
Mobile - Pensacola	1,210.9	0.5027	2.81	542,610	508,024	1,150	250,965	49	194,588	38	85	108
Monroe - El Dorado	520.3	0.2161	2.85	153,338	145,031	409	64,056	44	46,543	32	66	95
Montgomery	555.3	0.2307	2.82	179,495	173,705	443	102,374	59	53,767	31	78	111
Nashville	1,866.4	0.7753	2.73	788,567	767,427	1,896	339,534	44	354,434	46	89	103
New Orleans	1,811.3	0.7520	2.80	1,218,449	1,140,118	1,916	438,898	38	470,683	41	110	114
New York	18,447.3	7.6598	2.69	11,256,930	10,357,135	21,623	2,693,241	26	5,867,604	57	107	104
Norfolk - Portsmouth - Newport News - Hampton	1,546.7	0.6419	2.96	786,763	768,269	1,816	353,574	46	346,456	45	108	100
North Platte	49.8	0.0210	2.66	25,519	22,534	75	9,109	40	11,732	52	101	83
Odessa - Midland	416.9	0.1731	2.83	310,683	284,187	552	130,835	46	117,341	41	90	81
Oklahoma City	1,583.9	0.6578	2.61	1,097,834	1,065,089	2,239	503,888	47	413,688	39	111	80
Omaha	942.8	0.3915	2.66	477,641	418,295	1,200	174,888	42	213,794	51	90	82
Orlando - Daytona Beach - Melbourne	1,863.4	0.7737	2.55	1,152,206	1,094,143	2,232	413,932	38	569,047	52	111	127
Ottumwa - Kirksville	78.5	0.0326	2.66	26,431	23,702	92	10,742	45	11,129	47	64	63
Paducah - Cape Girardeau - Harrisburg - Marion	845.6	0.3505	2.64	293,400	275,714	1,033	144,839	53	111,141	40	71	64
Palm Springs	817.9	0.3396	2.69	475,783	456,268	931	184,457	40	256,324	56	94	92
Panama City	205.8	0.0857	2.66	118,454	111,789	272	41,591	37	59,270	53	129	82
Parkersburg	93.0	0.0386	2.61	45,001	42,197	99	22,862	54	15,512	37	94	95
Peoria	586.5	0.2435	2.70	261,774	235,846	736	99,233	42	119,693	51	91	83
Philadelphia	7,221.5	2.9985	2.72	4,023,723	3,598,857	7,851	1,252,770	35	1,845,075	51	96	98
Phoenix	2,265.3	0.9406	2.59	1,306,707	1,213,222	2,457	426,418	35	651,729	54	90	115
Pittsburgh	3,216.8	1.3359	2.63	1,493,712	1,329,772	3,198	481,037	36	678,500	51	87	96
Portland, Ore.	2,112.2	0.8771	2.61	1,270,070	1,159,460	2,934	413,316	36	653,883	56	120	82
Portland - Poland Spring	812.1	0.3373	2.67	488,162	473,163	1,271	164,293	35	272,918	58	90	80
Presque Isle	87.2	0.0362	2.96	25,752	24,960	88	9,424	38	13,539	54	55	83
Providence - New Bedford	1,569.5	0.6516	2.74	939,949	862,484	2,051	284,162	33	489,704	57	89	82
Quincy - Hannibal	369.8	0.1538	2.66	126,652	110,126	468	53,562	49	48,792	44	63	62
Raleigh - Durham	1,725.8	0.7166	2.80	785,770	767,742	1,881	397,588	52	295,865	39	90	101
Rapid City	230.4	0.0958	2.78	109,123	92,541	345	31,914	34	54,232	59	84	70
Reno	364.6	0.1514	2.45	251,329	228,383	492	78,574	34	131,553	58	84	385
Richmond	1,186.6	0.4928	2.85	505,530	497,760	1,374	244,050	49	200,420	40	79	99
Roanoke - Lynchburg	983.9	0.4084	2.87	379,367	372,602	1,076	175,833	47	151,188	41	78	101
Rochester, N.Y.	959.7	0.3986	2.73	549,191	505,306	1,148	160,266	32	280,140	55	100	98
Rochester - Mason City - Austin	375.0	0.1556	2.62	156,971	139,280	502	49,792	36	79,642	57	68	78
Rockford	519.2	0.2156	2.69	242,827	212,718	653	84,744	40	111,921	53	88	81
Roswell	178.4	0.0740	2.79	99,462	91,422	230	40,758	45	43,431	48	69	79
Sacramento - Stockton	2,571.4	1.0677	2.66	1,539,591	1,431,542	3,417	610,450	43	741,466	52	100	80

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ADI REPORT

ADI Name	12/31/85 Population (Thous.)	% Of U.S.	Average Household Size	1985 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Eating Place Units	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RCI
St. Joseph	128.1	0.0532	2.67	56,829	52,510	161	23,742	45	23,181	44	66	77
St. Louis	2,932.9	1.2177	2.76	1,489,572	1,376,874	3,152	639,377	46	561,000	41	87	102
Salinas - Monterey	580.8	0.2412	2.88	361,027	340,205	849	117,998	35	209,758	62	123	91
Salisbury	231.8	0.0961	2.72	202,947	191,402	424	76,816	40	102,979	54	139	76
Salt Lake City	1,852.6	0.7695	3.19	710,351	671,589	1,874	292,680	44	330,872	49	76	110
San Angelo	127.4	0.0528	2.78	79,947	75,786	168	34,188	45	31,400	41	96	71
San Antonio	1,578.4	0.6552	3.00	891,464	826,236	1,836	360,085	44	326,212	39	98	92
San Diego	2,140.9	0.8890	2.72	1,469,036	1,380,861	2,619	481,393	35	783,800	57	130	104
San Francisco	5,423.3	2.2518	2.58	4,652,981	4,347,758	7,906	1,384,670	32	2,514,063	58	132	104
Santa Barbara - Santa Maria - San Luis Obispo	519.1	0.2156	2.66	445,453	423,464	836	132,012	31	272,105	64	128	85
Sarasota	247.6	0.1028	2.19	177,091	170,249	339	42,498	25	114,453	67	115	81
Savannah	602.6	0.2499	2.93	306,559	291,519	607	149,959	51	112,092	38	100	119
Seattle - Tacoma	3,094.1	1.2847	2.55	2,070,090	1,912,402	4,078	615,257	32	1,110,337	58	114	91
Shreveport - Texarkana	1,128.2	0.4687	2.76	391,294	375,937	1,001	184,415	49	145,586	39	73	93
Sioux City	448.8	0.1866	2.66	163,312	138,490	655	57,480	42	70,600	51	57	56
Sioux Falls - Mitchell	586.5	0.2433	2.69	243,527	206,104	808	69,795	34	123,276	60	77	68
South Bend - Elkhart	792.0	0.3288	2.77	382,067	353,177	1,062	152,112	43	170,466	48	98	73
Spokane	857.8	0.3562	2.67	402,899	364,315	1,096	138,199	38	205,475	56	80	75
Springfield, Mass.	586.1	0.2434	2.75	395,988	360,659	695	105,743	29	216,875	60	102	91
Springfield, Mo.	775.2	0.3219	2.70	278,059	262,321	979	127,447	49	106,459	41	71	69
Springfield - Decatur - Champaign	855.3	0.3552	2.63	416,109	371,447	1,044	160,393	43	177,621	48	94	85
Syracuse	963.6	0.4003	2.82	461,926	410,838	1,143	137,680	34	226,571	55	82	91
Tallahassee - Thomasville	453.8	0.1883	2.82	201,007	193,208	462	85,507	44	90,254	47	93	107
Tampa - St. Petersburg	2,590.3	1.0755	2.42	1,450,781	1,367,734	2,873	524,704	38	690,505	50	94	100
Terre Haute	437.6	0.1817	2.65	169,864	154,589	515	75,941	49	64,918	42	74	70
Toledo	1,102.5	0.4577	2.75	641,031	589,176	1,357	233,164	40	294,848	50	99	83
Topeka	397.6	0.1651	2.72	197,478	181,480	547	91,606	50	74,722	41	87	78
Traverse City - Cadillac	420.3	0.1747	2.71	211,328	184,612	726	70,907	38	103,326	56	84	59
Tucson	764.3	0.3173	2.56	395,652	359,997	843	142,444	40	180,316	50	94	93
Tulsa	1,218.4	0.5059	2.63	612,039	596,257	1,471	297,718	50	217,635	37	97	84
Tuscaloosa	144.2	0.0598	2.76	60,872	57,292	129	32,661	57	18,049	32	75	104
Twin Falls	89.2	0.0370	2.91	37,627	34,764	101	13,544	39	19,212	55	76	78
Tyler	457.1	0.1898	2.79	226,633	220,059	526	102,060	46	90,612	41	85	77
Utica	384.9	0.1599	2.80	160,788	147,566	486	49,305	33	78,419	53	75	71
Victoria	77.7	0.0323	2.93	47,452	41,637	99	18,269	44	17,352	42	82	74
Waco - Temple	650.6	0.2702	2.86	343,151	324,962	734	145,147	45	134,905	42	99	77
Washington, D.C.	4,219.6	1.7520	2.72	2,841,178	2,744,278	4,780	992,738	36	1,299,421	47	115	130
Watertown - Carthage	236.5	0.0982	2.97	94,139	79,743	285	29,225	37	42,275	53	78	70
Wausau - Rhinelander	448.5	0.1863	2.77	178,993	151,983	595	45,793	30	97,987	64	79	68
West Palm Beach	1,035.6	0.4300	2.38	676,589	636,821	1,227	182,750	29	403,603	63	101	108
Wheeling - Steubenville	421.1	0.1750	2.67	151,501	138,758	449	68,189	49	57,355	41	70	79
Wichita - Hutchinson	1,106.7	0.4598	2.62	496,838	478,738	1,723	233,143	49	198,440	41	78	68
Wichita Falls - Lawton	450.1	0.1872	2.77	221,282	212,595	559	102,115	48	83,763	39	93	73
Wilkes-Barre - Scranton	1,142.9	0.4743	2.67	451,981	412,819	1,263	158,149	38	194,169	47	77	79
Wilmington	377.1	0.1565	2.84	151,371	147,909	439	79,312	54	56,200	38	81	78
Yakima	467.8	0.1944	2.75	225,784	202,311	623	70,074	35	118,398	59	81	75
Youngstown	757.3	0.3144	2.72	330,201	297,614	850	135,585	46	132,338	44	83	78
Zanesville	84.8	0.0352	2.70	39,632	36,184	113	16,889	47	14,962	41	90	67
Total ADIs	239,224.4	99.3319	2.72	132,493,819	123,227,400	280,370	47,421,198	38	61,620,781	50	99	100

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TOP 100 EATING PLACE MARKETS

BY METRO AREA 1985

Metro Area Name	Sales ($000)	Ranking
Los Angeles - Long Beach	5,252,265	1
New York	5,179,071	2
Chicago	3,207,466	3
Boston - Lawrence - Salem - Lowell - Brockton	3,194,389	4
Washington	2,467,739	5
Philadelphia	2,339,525	6
Detroit	2,186,337	7
Houston	2,162,103	8
San Francisco	1,905,828	9
Anaheim - Santa Ana	1,754,791	10
Atlanta	1,726,958	11
Dallas	1,709,660	12
Nassau - Suffolk	1,455,471	13
San Diego	1,380,861	14
Minneapolis - St. Paul	1,258,259	15
Seattle	1,254,361	16
St. Louis	1,248,137	17
Baltimore	1,199,812	18
Denver	1,175,346	19
Oakland	1,135,110	20
Phoenix	1,075,003	21
Tampa - St. Petersburg - Clearwater	1,061,782	22
Miami - Hialeah	1,048,742	23
Cleveland	1,042,307	24
Pittsburgh	1,039,010	25
Riverside - San Bernardino	1,013,009	26
San Jose	1,008,106	27
New Orleans	902,098	28
Newark	891,050	29
Fort Lauderdale - Hollywood - Pompano Beach	867,542	30
Honolulu	855,274	31
Kansas City	839,015	32
Bergen - Passaic	826,595	33
Cincinnati	820,859	34
Sacramento	805,445	35
Oklahoma City	797,906	36
Columbus, Ohio	754,210	37
Indianapolis	738,946	38
Fort Worth - Arlington	728,126	39
San Antonio	727,990	40
Portland, Ore	712,303	41
Hartford - New Britain - Middletown - Bristol	710,122	42
Milwaukee	687,936	43
Norfolk - Virginia Beach - Newport News	673,154	44
Orlando	616,084	45
Bridgeport - Stamford - Norwalk - Danbury	589,430	46
Louisville	538,668	47
Charlotte - Gastonia - Rock Hill	524,006	48
Nashville	522,969	49
Rochester, N.Y.	516,048	50
West Palm Beach - Boca Raton - Delray Beach	499,422	51
Greensboro - Winston-Salem - High Point	497,357	52
Buffalo	493,075	53
Dayton - Springfield	479,447	54
Monmouth - Ocean	478,059	55
Austin	473,584	56
New Haven - Waterbury - Meriden	465,391	57
Memphis	459,171	58
Providence - Pawtucket - Woonsocket	457,754	59
Tulsa	447,864	60
Middlesex - Somerset - Hunterdon	446,698	61
Knoxville	439,980	62
Jacksonville, Fla.	427,421	63
Richmond - Petersburg	405,173	64
Toledo	404,717	65
Salt Lake City - Ogden	395,643	66
Worcester - Fitchburg - Leominster	370,677	67
Albany - Schenectady - Troy	370,654	68
Las Vegas	369,335	69
Raleigh - Durham	363,297	70
Springfield, Mass.	360,659	71
Gary - Hammond	346,991	72
Akron	343,134	73
Birmingham	342,686	74
Omaha	327,439	75
Tucson	317,774	76
Grand Rapids	311,282	77
Scranton - Wilkes-Barre	308,628	78
Allentown - Bethlehem	297,938	79
Syracuse	297,693	80
Anchorage	290,667	81
Albuquerque	288,352	82
Greenville - Spartanburg	284,608	83
Santa Barbara - Santa Maria - Lompoc	284,571	84
Harrisburg - Lebanon - Carlisle	281,819	85
Atlantic City	280,561	86
Baton Rouge	269,121	87
Bakersfield	263,938	88
New Bedford - Fall River - Attleboro	257,560	89
Little Rock - North Little Rock	257,036	90
Tacoma	256,386	91
Wilmington, Del.	253,677	92
Oxnard - Ventura	253,329	93
Fresno	249,017	94
Charleston, S.C.	242,088	95
Columbia, S.C.	229,410	96
El Paso	229,071	97
Flint	221,018	98

BY ADI

ADI NAME	Sales ($000)	Ranking
New York	10,357,135	1
Los Angeles	7,836,520	2
Boston	4,424,345	3
San Francisco	4,347,758	4
Chicago	4,242,913	5
Philadelphia	3,598,857	6
Washington, D.C.	2,744,278	7
Dallas - Ft. Worth	2,681,697	8
Houston	2,476,487	9
Detroit	2,352,243	10
Atlanta	2,022,396	11
Miami	1,984,094	12
Seattle - Tacoma	1,912,402	13
Cleveland	1,910,589	14
Denver	1,797,919	15
Minneapolis - St. Paul	1,613,780	16
Sacramento - Stockton	1,431,542	17
Hartford - New Haven	1,393,456	18
San Diego	1,380,861	19
St. Louis	1,376,874	20
Tampa - St. Petersburg	1,367,734	21
Pittsburgh	1,329,772	22
Baltimore	1,264,986	23
Phoenix	1,213,222	24
Indianapolis	1,194,436	25
Portland, Ore	1,159,460	26
New Orleans	1,140,118	27
Orlando - Daytona Beach - Melbourne	1,094,143	28
Oklahoma City	1,065,089	29
Cincinnati	988,631	30
Kansas City	955,197	31
Columbus, Ohio	888,305	32
Milwaukee	880,481	33
Providence - New Bedford	862,484	34
San Antonio	826,236	35
Charlotte	801,653	36
Norfolk - Portsmouth - Newport News - Hampton	768,269	37
Raleigh - Durham	767,742	38
Nashville	767,427	39
Buffalo	750,295	40
Grand Rapids - Kalamazoo - Battle Creek	690,820	41
Salt Lake City	671,589	42
Greenville - Spartanburg - Asheville	661,685	43
Louisville	653,619	44
Greensboro - Winston-Salem - High Point	651,143	45
West Palm Beach	636,821	46
Harrisburg - York - Lancaster - Lebanon	634,142	47
Dayton	622,352	48
Memphis	606,054	49
Tulsa	596,257	50
Toledo	589,176	51
Albany - Schenectady - Troy	586,204	52
Knoxville	582,749	53
Austin, Tex.	545,494	54
Albuquerque	542,819	55
Jacksonville	541,620	56
Flint - Saginaw - Bay City	537,011	57
Mobile - Pensacola	508,024	58
Rochester, N.Y.	505,306	59
Richmond	497,760	60
Fresno - Visalia	486,641	61
Wichita - Hutchinson	478,738	62
Little Rock	478,150	63
Birmingham	475,395	64
Portland - Poland Spring	473,163	65
Palm Springs	456,268	66
Charleston - Huntington	441,376	67
Santa Barbara - Santa Maria - San Luis Obispo	423,464	68
Omaha	418,235	69
Wilkes-Barre - Scranton	412,819	70
Syracuse	410,838	71
Green Bay	385,729	72
Des Moines	381,189	73
Shreveport - Texarkana	375,937	74
Lexington	375,094	75
Las Vegas	373,876	76
Roanoke - Lynchburg	372,602	77
Springfield - Decatur - Champaign	371,447	78
Spokane	364,315	79
Springfield, Mass.	360,659	80
Tucson	359,997	81
Burlington - Plattsburgh	356,163	82
South Bend - Elkhart	353,177	83
Baton Rouge	342,987	84
Salinas - Monterey	340,205	85
Davenport - Rock Island - Moline	337,468	86
Waco - Temple	324,962	87
Columbia, S.C.	317,275	88
Chattanooga	313,553	89
Cedar Rapids - Waterloo - Dubuque	308,113	90
Madison	305,110	91
Evansville	302,161	92
Youngstown	297,614	93
Charleston, S.C.	291,530	94
Savannah	291,519	95
Colorado Springs - Pueblo	288,047	96
Odessa - Midland	284,187	97
El Paso	283,669	98
Lincoln - Hastings - Kearney	282,199	99

TOP 100 FAST FOOD MARKETS

BY METRO AREA 1985

Metro Area Name	Sales ($000)	Ranking
Los Angeles - Long Beach	1,758,275	1
New York	1,207,048	2
Chicago	1,130,337	3
Washington	861,778	4
Boston - Lawrence - Salem - Lowell - Brockton	846,318	5
Houston	839,995	6
Detroit	823,008	7
Philadelphia	811,508	8
Atlanta	804,486	9
Dallas	689,849	10
Anaheim - Santa Ana	610,850	11
St. Louis	575,571	12
Baltimore	492,466	13
San Diego	481,393	14
Riverside - San Bernardino	448,511	15
San Francisco	442,782	16
Oakland	436,547	17
Nassau - Suffolk	416,632	18
Minneapolis - St. Paul	413,736	19
Cleveland	397,220	20
San Jose	390,935	21
Tampa - St. Petersburg - Clearwater	389,610	22
Seattle	381,979	23
Kansas City	377,334	24
Phoenix	374,519	25
Oklahoma City	369,227	26
Columbus, Ohio	359,389	27
Denver	356,785	28
Pittsburgh	353,354	29
Miami - Hialeah	345,055	30
Indianapolis	343,357	31
New Orleans	342,495	32
Sacramento	334,992	33
Cincinnati	333,954	34
Ft. Worth - Arlington	332,348	35
San Antonio	308,056	36
Norfolk - Virginia Beach - Newport News	301,713	37
Honolulu	294,026	38
Louisville	287,041	39
Charlotte - Gastonia - Rock Hill	281,792	40
Newark	257,436	41
Fort Lauderdale - Hollywood - Pompano Beach	247,653	42
Milwaukee	242,825	43
Portland, Ore	237,864	44
Greensboro - Winston-Salem - High Point	236,493	45
Memphis	235,505	46
Dayton - Springfield	235,138	47
Orlando	232,355	48
Hartford - New Britain - Middletown - Bristol	225,600	49
Tulsa	222,195	50
Bergen - Passaic	214,792	51
Nashville	212,529	52
Jacksonville, Fla.	203,778	53
Austin	203,705	54
Knoxville	201,683	55
Richmond - Petersburg	196,826	56
Birmingham	181,611	57
Salt Lake City - Ogden	180,890	58
Raleigh - Durham	176,591	59
Buffalo	169,915	60
Gary - Hammond	164,163	61
Rochester, N.Y.	164,086	62
Greenville - Spartanburg	159,365	63
New Haven - Waterbury - Meriden	157,041	64
Toledo	153,052	65
Bridgeport - Stamford - Norwalk - Danbury	149,257	66
Monmouth - Ocean	147,848	67
Baton Rouge	145,511	68
Providence - Pawtucket - Woonsocket	144,237	69
Omaha	137,214	70
Little Rock - North Little Rock	133,991	71
Middlesex - Somerset - Hunterdon	133,756	72
Akron	132,619	73
Las Vegas	127,867	74
Tucson	126,434	75
West Palm Beach - Boca Raton - Delray Beach	126,247	76
Albany - Schenectady - Troy	121,011	77
Columbia, S.C.	120,763	78
Charleston, S.C.	118,191	79
Albuquerque	116,436	80
Scranton - Wilkes-Barre	112,627	81
Bakersfield	112,089	82
Fresno	111,323	83
Lexington-Fayette	110,549	84
Wilmington, Del.	109,615	85
Harrisburg - Lebanon - Carlisle	109,446	86
Grand Rapids	107,305	87
Springfield, Mass.	105,743	88
Allentown - Bethlehem	105,611	89
Johnson City - Kingsport - Bristol	104,970	90
El Paso	104,462	91
Youngstown - Warren	104,033	92
Mobile	103,419	93
Wichita	99,759	94
Worcester - Fitchburg - Leominster	99,007	95
New Bedford - Fall River - Attleboro	98,752	96
Chattanooga	98,346	97
Stockton	97,237	98
Flint	96,360	99
Syracuse	96,141	100

BY ADI

ADI NAME	Sales ($000)	Ranking
Los Angeles	2,730,963	1
New York	2,693,241	2
Chicago	1,567,164	3
San Francisco	1,384,670	4
Philadelphia	1,252,770	5
Boston	1,174,470	6
Dallas - Ft. Worth	1,147,825	7
Houston	994,556	8
Washington, D.C.	992,738	9
Atlanta	974,889	10
Detroit	887,659	11
Cleveland	762,849	12
St. Louis	639,377	13
Miami	620,595	14
Seattle - Tacoma	615,257	15
Sacramento - Stockton	610,450	16
Indianapolis	566,080	17
Denver	554,398	18
Minneapolis - St. Paul	530,179	19
Tampa - St. Petersburg	524,704	20
Baltimore	519,333	21
Oklahoma City	503,888	22
San Diego	481,393	23
Pittsburgh	481,037	24
Hartford - New Haven	453,973	25
New Orleans	438,898	26
Kansas City	433,911	27
Charlotte	430,781	28
Phoenix	426,418	29
Columbus, Ohio	422,271	30
Orlando - Daytona Beach - Melbourne	413,932	31
Cincinnati	413,868	32
Portland, Ore.	413,316	33
Raleigh - Durham	397,588	34
San Antonio	360,085	35
Greenville - Spartanburg - Asheville	357,200	36
Louisville	353,652	37
Norfolk - Portsmouth - Newport News - Hampton	353,574	38
Nashville	339,534	39
Greensboro - Winston-Salem - High Point	319,667	40
Memphis	316,146	41
Dayton	304,365	42
Milwaukee	304,136	43
Tulsa	297,718	44
Salt Lake City	292,680	45
Providence - New Bedford	284,162	46
Knoxville	278,360	47
Little Rock	265,903	48
Buffalo	264,250	49
Jacksonville	262,405	50
Birmingham	261,017	51
Grand Rapids - Kalamazoo - Battle Creek	257,028	52
Mobile - Pensacola	250,965	53
Charleston - Huntington	249,624	54
Richmond	244,050	55
Austin, Tex.	241,654	56
Harrisburg - York - Lancaster - Lebanon	236,489	57
Toledo	233,164	58
Wichita - Hutchinson	233,143	59
Albuquerque	224,832	60
Flint - Saginaw - Bay City	221,977	61
Fresno - Visalia	215,602	62
Lexington	208,255	63
Albany - Schenectady - Troy	184,877	64
Palm Springs	184,457	65
Shreveport - Texarkana	184,415	66
West Palm Beach	182,750	67
Roanoke - Lynchburg	175,833	68
Baton Rouge	175,087	69
Omaha	174,888	70
Portland - Poland Spring	164,293	71
Chattanooga	163,127	72
Des Moines	161,790	73
Springfield - Decatur - Champaign	160,393	74
Columbia, S.C.	160,268	75
Rochester, N.Y.	160,266	76
Evansville	160,206	77
Wilkes-Barre - Scranton	158,149	78
Davenport - Rock Island - Moline	156,175	79
South Bend - Elkhart	152,112	80
Savannah	149,959	81
Waco - Temple	145,147	82
Paducah - Cape Girardeau - Harrisburg - Marion	144,839	83
Bristol - Kingsport - Johnson City	143,409	84
Tucson	142,444	85
Charleston, S.C.	140,333	86
Huntsville - Decatur - Florence	140,078	87
Spokane	138,199	88
Syracuse	137,680	89
Youngstown	135,585	90
Corpus Christi	134,301	91
Jackson, Miss.	133,369	92
Santa Barbara - Santa Maria - San Luis Obispo	132,012	93
Green Bay	130,866	94
Odessa - Midland	130,835	95
Cedar Rapids - Waterloo - Dubuque	129,749	96
Las Vegas	129,440	97
El Paso	128,053	98

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TOP 100 RESTAURANT MARKETS

BY METRO AREA 1985

Metro Area Name	Sales ($000)	Ranking
New York	3,009,716	1
Los Angeles - Long Beach	2,972,577	2
Boston - Lawrence - Salem - Lowell - Brockton	1,831,479	3
Chicago	1,706,216	4
San Francisco	1,199,010	5
Washington	1,188,769	6
Philadelphia	1,168,285	7
Detroit	1,117,808	8
Anaheim - Santa Ana	1,019,100	9
Houston	984,649	10
San Diego	783,800	11
Nassau - Suffolk	779,839	12
Dallas	748,231	13
Minneapolis - St. Paul	726,353	14
Seattle	720,272	15
Atlanta	691,709	16
Denver	661,499	17
Oakland	614,992	18
Phoenix	575,024	19
Miami - Hialeah	551,570	20
Pittsburgh	548,768	21
Tampa - St. Petersburg - Clearwater	545,029	22
Cleveland	538,078	23
San Jose	531,074	24
Fort Lauderdale - Hollywood - Pompano Beach	529,337	25
Riverside - San Bernardino	518,569	26
Baltimore	508,087	27
St. Louis	504,486	28
Bergen - Passaic	466,194	29
Honolulu	462,034	30
Newark	452,065	31
Sacramento	418,693	32
Portland, Ore	410,749	33
New Orleans	409,296	34
Cincinnati	398,248	35
Milwaukee	388,339	36
Kansas City	381,909	37
Hartford - New Britain - Middletown - Bristol	368,016	38
Bridgeport - Stamford - Norwalk - Danbury	353,813	39
West Palm Beach - Boca Raton - Delray Beach	332,718	40
Orlando	325,987	41
Columbus, Ohio	325,417	42
Oklahoma City	314,040	43
Norfolk - Virginia Beach - Newport News	310,652	44
Indianapolis	296,588	45
Fort Worth - Arlington	288,533	46
San Antonio	286,940	47
Monmouth - Ocean	286,799	48
Rochester, N.Y.	286,041	49
Providence - Pawtucket - Woonsocket	266,557	50
New Haven - Waterbury - Meriden	261,113	51
Nashville	255,795	52
Middlesex - Somerset - Hunterdon	254,857	53
Buffalo	250,499	54
Worcester - Fitchburg - Leominster	220,509	55
Springfield, Mass.	216,875	56
Albany - Schenectady - Troy	213,918	57
Austin	211,711	58
Toledo	208,722	59
Louisville	196,430	60
Dayton - Springfield	196,036	61
Charlotte - Gastonia - Rock Hill	194,523	62
Knoxville	192,691	63
Akron	188,878	64
Las Vegas	187,927	65
Santa Barbara - Santa Maria - Lompoc	187,919	66
Greensboro - Winston-Salem - High Point	184,330	67
Salt Lake City - Ogden	182,373	68
Jacksonville, Fla.	182,021	69
Grand Rapids	169,448	70
Omaha	166,635	71
Richmond - Petersburg	166,624	72
Syracuse	166,501	73
Atlantic City	166,140	74
Memphis	165,118	75
Tulsa	161,542	76
Tucson	156,982	77
Gary - Hammond	153,914	78
Scranton - Wilkes-Barre	149,736	79
Oxnard - Ventura	149,614	80
Tacoma	148,111	81
Allentown - Bethlehem	147,350	82
Raleigh - Durham	142,605	83
Harrisburg - Lebanon - Carlisle	140,648	84
Albuquerque	136,152	85
Bakersfield	135,730	86
Salinas - Seaside - Monterey	134,352	87
New Bedford - Fall River - Attleboro	131,945	88
Madison	130,837	89
Fresno	127,165	90
Wilmington, Del.	125,893	91
Portsmouth - Dover - Rochester	123,519	92
Anchorage	123,275	93
Manchester - Nashua	121,158	94
Lancaster	115,715	95
Vallejo - Fairfield - Napa	115,131	96
Sarasota	114,453	97
Birmingham	114,344	98

BY ADI

ADI NAME	Sales ($000)	Ranking
New York	5,867,604	1
Los Angeles	4,415,288	2
Boston	2,617,593	3
San Francisco	2,514,063	4
Chicago	2,212,031	5
Philadelphia	1,845,075	6
Washington, D.C.	1,299,421	7
Detroit	1,203,002	8
Dallas - Ft. Worth	1,134,391	9
Miami	1,115,892	10
Seattle - Tacoma	1,110,337	11
Houston	1,109,367	12
Denver	1,035,349	13
Cleveland	973,115	14
Minneapolis - St. Paul	944,848	15
Atlanta	793,880	16
San Diego	783,800	17
Hartford - New Haven	758,278	18
Sacramento - Stockton	741,466	19
Tampa - St. Petersburg	690,505	20
Pittsburgh	678,500	21
Portland, Ore.	653,883	22
Phoenix	651,729	23
Orlando - Daytona Beach - Melbourne	569,047	24
St. Louis	561,000	25
Baltimore	543,222	26
Milwaukee	507,937	27
Providence - New Bedford	489,704	28
Indianapolis	482,460	29
Cincinnati	470,993	30
New Orleans	470,683	31
Kansas City	432,101	32
Oklahoma City	413,688	33
West Palm Beach	403,603	34
Columbus, Ohio	381,127	35
Buffalo	381,002	36
Grand Rapids - Kalamazoo - Battle Creek	361,998	37
Nashville	354,434	38
Norfolk - Portsmouth - Newport News - Hampton	346,456	39
Albany - Schenectady - Troy	341,856	40
Harrisburg - York - Lancaster - Lebanon	338,569	41
Salt Lake City	330,872	42
San Antonio	326,212	43
Charlotte	301,441	44
Raleigh - Durham	295,865	45
Toledo	294,848	46
Rochester, N.Y.	280,140	47
Portland - Poland Spring	272,918	48
Santa Barbara - Santa Maria - San Luis Obispo	272,105	49
Flint - Saginaw - Bay City	266,451	50
Albuquerque	262,443	51
Palm Springs	256,324	52
Dayton	254,499	53
Fresno - Visalia	252,398	54
Knoxville	248,308	55
Greensboro - Winston-Salem - High Point	242,569	56
Greenville - Spartanburg - Asheville	241,820	57
Austin, Tex.	240,357	58
Louisville	236,287	59
Jacksonville	229,571	60
Green Bay	227,752	61
Syracuse	226,571	62
Memphis	217,652	63
Tulsa	217,635	64
Springfield, Mass.	216,875	65
Burlington - Plattsburgh	215,862	66
Omaha	213,794	67
Salinas - Monterey	209,758	68
Spokane	205,475	69
Richmond	200,420	70
Wichita - Hutchinson	198,440	71
Mobile - Pensacola	194,588	72
Wilkes-Barre - Scranton	194,169	73
Las Vegas	190,409	74
Madison	187,893	75
Des Moines	181,894	76
Tucson	180,316	77
Springfield - Decatur - Champaign	177,621	78
South Bend - Elkhart	170,466	79
Little Rock	163,798	80
Ft. Myers - Naples	157,517	81
Birmingham	155,137	82
Cedar Rapids - Waterloo - Dubuque	153,066	83
Charleston - Huntington	152,730	84
Roanoke - Lynchburg	151,188	85
Davenport - Rock Island - Moline	150,424	86
Ft. Wayne	149,168	87
Shreveport - Texarkana	145,586	88
Lincoln - Hastings - Kearney	144,598	89
Colorado Springs - Pueblo	140,911	90
Bakersfield	135,730	91
Lexington	135,101	92
Waco - Temple	134,905	93
Lansing	134,203	94
Youngstown	132,338	95
Reno	131,553	96
Chattanooga	126,647	97
Sioux Falls - Mitchell	123,276	98
Fargo	120,806	99

TOP 100 PER CAPITA EATING PLACE MARKETS

BY METRO AREA 1985 BY ADI

Metro Area Name	Sales Per Capita	Ranking
Anchorage	1,226	1
San Francisco	1,225	2
Honolulu	1,033	3
Atlantic City	920	4
Odessa	916	5
Boston - Lawrence - Salem - Lowell - Brockton	863	6
Santa Barbara - Santa Maria - Lompoc	861	7
Anaheim - Santa Ana	826	8
Portland, Me	816	9
Oklahoma City	811	10
Houma - Thibodaux	794	11
Panama City	792	12
Midland, Tex	791	13
Lafayette, La	768	14
Abilene	767	15
Naples	749	16
Fort Lauderdale - Hollywood - Pompano Beach	748	17
Dallas	745	18
Knoxville	735	19
Seattle	729	20
Burlington, Vt	728	21
Bryan - College Station	724	22
San Jose	724	22
Boulder - Longmont	723	24
Reno	720	25
Bridgeport - Stamford - Norwalk - Danbury	719	26
Denver	719	26
Orlando	713	28
Washington	707	29
Atlanta	702	30
Sarasota	688	31
Austin	686	32
West Palm Beach - Boca Raton - Delray Beach	684	33
Wilmington, N C	682	34
San Angelo	679	35
Houston	673	36
Manchester - Nashua	671	37
Amarillo	669	38
New Orleans	669	38
Las Vegas	666	40
Savannah	665	41
Hartford - New Britain - Middletown - Bristol	660	42
Lexington-Fayette	658	43
Toledo	655	44
Fort Walton Beach	649	45
Los Angeles - Long Beach	649	45
Madison	649	45
San Diego	645	48
Pittsfield	643	49
Bergen - Passaic	639	50
Lubbock	637	51
Sacramento	636	52
Portsmouth - Dover - Rochester	634	53
Longview - Marshall	626	54
Santa Fe	624	55
Rapid City	621	56
Enid	620	57
Portland, Ore	620	57
Fort Worth - Arlington	619	59
Owensboro	618	60
Springfield, Mass	615	61
New York	614	62
Albuquerque	613	63
Indianapolis	611	64
Wichita Falls	611	64
Bradenton	609	66
Galveston - Texas City	609	66
New London - Norwich	608	68
Muncie	606	69
Kalamazoo	604	70
Daytona Beach	603	71
Salinas - Seaside - Monterey	603	71
Burlington, N C	602	73
New Haven - Waterbury - Meriden	602	73
San Antonio	602	73
Tulsa	601	76
Asheville	599	77
Oakland	596	78
Santa Cruz	596	78
Billings	595	80
Cheyenne	593	81
Miami - Hialeah	592	82
Champaign - Urbana - Rantoul	589	83
Gainesville	589	83
Bellingham	588	85
Ann Arbor	586	86
Biloxi - Gulfport	585	87
Columbus, Ohio	585	87
Cincinnati	584	89
Phoenix	584	89
Terre Haute	584	89
Boise	582	92
Colorado Springs	578	93
Lafayette - West Lafayette	574	94
Nashville	574	94
Raleigh - Durham	574	94
Corpus Christi	569	97
Tampa - St. Petersburg - Clearwater	568	98
Rochester, Minn	563	99
Kansas City	560	100

ADI NAME	Sales Per Capita	Ranking
Salisbury	826	1
Santa Barbara - Santa Maria - San Luis Obispo	816	2
Boston	802	3
San Francisco	802	3
Flagstaff	784	5
Denver	692	6
Sarasota	688	7
Odessa - Midland	682	8
Oklahoma City	672	9
Miami	661	10
Los Angeles	657	11
Las Vegas	653	12
Washington, D C	650	13
Austin, Tex	646	14
San Diego	645	15
Dallas - Ft. Worth	635	16
New Orleans	629	17
Reno	626	18
Houston	624	19
Biloxi - Gulfport - Pascagoula	619	20
Seattle - Tacoma	618	21
Hartford - New Haven	617	22
Springfield, Mass	615	23
West Palm Beach	615	23
Atlanta	610	25
Charlottesville	604	26
Florence, S C	596	27
San Angelo	595	28
Orlando - Daytona Beach - Melbourne	587	29
Salinas - Monterey	586	30
Portland - Poland Spring	583	31
New York	561	32
Palm Springs	558	33
Ft. Myers - Naples	557	34
Sacramento - Stockton	557	34
Bakersfield	555	36
Madison	555	36
Providence - New Bedford	550	38
Portland, Ore	549	39
Gainesville	547	40
Lima	546	41
Panama City	543	42
Lafayette, Ind	541	43
Eureka	536	44
Phoenix	536	44
Victoria	536	44
Toledo	534	47
Grand Junction	532	48
Tampa - St. Petersburg	528	49
Rochester, N Y	527	50
Corpus Christi	525	51
Indianapolis	525	51
Knoxville	523	53
San Antonio	523	53
Bowling Green	520	55
Cheyenne	518	56
Baltimore	515	57
Abilene - Sweetwater	513	58
Burlington - Plattsburgh	512	59
Roswell	512	59
Columbus, Ohio	510	61
Cincinnati	504	62
Glendive	504	62
Detroit	503	64
Helena	503	64
Kansas City	503	64
Casper - Riverton	501	67
Colorado Springs - Pueblo	499	68
Waco - Temple	499	68
Philadelphia	498	70
Cleveland	497	71
Norfolk - Portsmouth - Newport News - Hampton	497	71
Amarillo	495	73
Minneapolis - St. Paul	494	74
Billings - Hardin	493	75
Chicago	493	75
Laredo	492	77
Tulsa	489	78
Greensboro - Winston-Salem - High Point	485	79
Savannah	484	80
Albuquerque	483	81
Tyler - Longview	481	82
Charleston, S C	476	83
Jacksonville	474	84
Chico - Redding	473	85
Wichita Falls - Lawton	472	86
Bend	471	87
Tucson	471	87
St. Louis	469	89
Milwaukee	465	90
Louisville	462	91
Boise	461	92
Eugene	460	93
Lubbock	459	94
Lafayette, La	456	95
Topeka	456	95
Dayton	455	97
Parkersburg	454	98
North Platte	452	99

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TOP 100 PER CAPITA FAST FOOD MARKETS

BY METRO AREA 1985

Metro Area Name	Sales Per Capita	Ranking
Odessa	402	1
Anchorage	391	2
Oklahoma City	375	3
Wilmington, N.C.	359	4
Honolulu	355	5
Midland, Tex.	347	6
Owensboro	345	7
Savannah	341	8
Abilene	337	9
Knoxville	337	9
Lexington-Fayette	334	11
Lafayette, La.	330	12
Atlanta	327	13
Bryan - College Station	318	14
Burlington, N.C.	317	15
Asheville	315	16
Houma - Thibodaux	313	17
Biloxi - Gulfport	312	18
Naples	308	19
Enid	304	20
Fayetteville - Springdale	303	21
Dallas	300	22
San Angelo	298	23
Tulsa	298	23
Louisville	296	25
Austin	295	26
Amarillo	294	27
Anaheim - Santa Ana	288	28
Panama City	287	29
Muncie	285	30
San Francisco	285	30
Indianapolis	284	32
Fort Worth - Arlington	283	33
Dothan	282	34
San Jose	281	35
Lubbock	280	36
Atlantic City	279	37
Columbus, Ohio	279	37
Raleigh - Durham	279	37
Topeka	279	37
Evansville	278	41
Santa Fe	278	41
Jackson, Tenn.	276	43
Terre Haute	275	44
Longview - Marshall	274	45
Columbia, S.C.	272	46
Lafayette - West Lafayette	270	47
Charlotte - Gastonia - Rock Hill	269	48
Orlando	269	48
Wichita Falls	268	50
Galveston - Texas City	267	51
Huntsville	267	51
Corpus Christi	265	53
Little Rock - North Little Rock	265	53
Portland, Me.	265	53
Sacramento	265	53
Athens	263	57
Baton Rouge	263	57
Greensboro - Winston-Salem - High Point	262	59
Greenville - Spartanburg	262	59
Houston	262	59
Kokomo	259	62
Bloomington, Ind.	256	63
Huntington - Ashland	256	63
Gary - Hammond	255	65
San Antonio	255	65
Dayton - Springfield	254	67
New Orleans	254	67
Lawrence, Kans.	253	69
Kansas City	252	70
Memphis	252	70
Lawton	251	72
Albany, Ga.	250	73
Jacksonville, Fla.	249	74
Albuquerque	248	75
Toledo	248	75
Colorado Springs	247	77
Elkhart - Goshen	247	77
Washington	247	77
Reno	246	80
Santa Barbara - Santa Maria - Lompoc	246	80
Fort Smith	245	82
Roanoke	245	82
Hickory	244	84
Santa Cruz	243	85
Richmond - Petersburg	242	86
Springfield, Mo.	242	86
Charleston, S.C.	241	88
Kalamazoo	241	88
Stockton	239	90
Waco	239	90
Cincinnati	238	92
St. Louis	238	92
Riverside - San Bernardino	237	94
Bakersfield	236	95
Shreveport	236	95
Boulder - Longmont	235	97
Fort Walton Beach	235	97
Madison	235	97
Texarkana	235	97
Victoria	235	97
Johnson City - Kingsport - Bristol	234	102

BY ADI

ADI NAME	Sales Per Capita	Ranking
Biloxi - Gulfport - Pascagoula	331	1
Salisbury	331	1
Bowling Green	322	3
Oklahoma City	318	4
Odessa - Midland	314	5
Atlanta	294	6
Flagstaff	294	6
Austin, Tex.	286	8
Florence, S.C.	274	9
Charlottesville	272	10
Dallas - Ft. Worth	272	10
San Angelo	268	12
Lafayette, Ind.	256	13
San Francisco	255	14
Santa Barbara - Santa Maria - San Luis Obispo	254	15
Corpus Christi	252	16
Houston	250	17
Knoxville	250	17
Louisville	250	17
Indianapolis	249	20
Savannah	249	20
Parkersburg	246	22
Tulsa	244	23
Abilene - Sweetwater	243	24
Columbus, Ohio	242	25
New Orleans	242	25
Lima	241	27
Charlotte	239	28
Greensboro - Winston-Salem - High Point	238	29
Sacramento - Stockton	237	30
Bakersfield	236	31
Victoria	235	32
Washington, D.C.	235	32
Amarillo	234	34
Raleigh - Durham	230	35
Topeka	230	35
Charleston, S.C.	229	37
Jacksonville	229	37
Los Angeles	229	37
Norfolk - Portsmouth - Newport News - Hampton	229	37
Baton Rouge	228	41
Kansas City	228	41
Roswell	228	41
San Antonio	228	41
Wichita Falls - Lawton	227	45
Las Vegas	226	46
Lexington	226	46
Palm Springs	226	46
Tuscaloosa	226	46
San Diego	225	50
Dayton	223	51
Tyler - Longview	223	51
Waco - Temple	223	51
Evansville	222	54
Orlando - Daytona Beach - Melbourne	222	54
Ft. Smith	219	56
Greenville - Spartanburg - Asheville	219	56
Laredo	218	58
St. Louis	218	58
Reno	216	60
Boston	213	61
Denver	213	61
Jackson, Tenn.	212	63
Little Rock	212	63
Baltimore	211	65
Cincinnati	211	65
Lubbock	211	65
Macon	211	65
Toledo	211	65
Wichita - Hutchinson	211	65
Jonesboro	210	71
Wilmington	210	71
Miami	207	73
Mobile - Pensacola	207	73
Harrisonburg	206	75
Richmond	206	75
Columbia, S.C.	205	77
Ft. Myers - Naples	204	78
Salinas - Monterey	203	79
Tampa - St. Petersburg	203	79
Cheyenne	202	81
Panama City	202	81
Portland - Poland Spring	202	81
Hartford - New Haven	201	84
Albuquerque	200	85
Gainesville	200	85
Casper - Riverton	199	87
Cleveland	199	87
Seattle - Tacoma	199	87
Zanesville	199	87
Chattanooga	197	91
Eugene	197	91
Colorado Springs - Pueblo	196	93
Eureka	196	93
Huntsville - Decatur - Florence	196	93
Lansing	196	93
Portland, Ore.	196	93
Albany, Ga.	193	98
South Bend - Elkhart	192	99

TOP 100 PER CAPITA RESTAURANT MARKETS

BY METRO AREA 1985

Metro Area Name	Sales Per Capita	Ranking
San Francisco	771	1
Santa Barbara - Santa Maria - Lompoc	568	2
Honolulu	558	3
Atlantic City	545	4
Anchorage	520	5
Portland, Me	496	6
Boston - Lawrence - Salem - Lowell - Brockton	495	7
Anaheim - Santa Ana	480	8
Sarasota	462	9
Fort Lauderdale - Hollywood - Pompano Beach	457	10
West Palm Beach - Boca Raton - Delray Beach	455	11
Burlington, Vt	451	12
Bridgeport - Stamford - Norwalk - Danbury	431	13
Boulder - Longmont	429	14
Panama City	422	15
Reno	421	16
Seattle	419	17
Pittsfield	409	18
Denver	405	19
Salinas - Seaside - Monterey	404	20
Manchester - Nashua	401	21
Portsmouth - Dover - Rochester	398	22
Madison	389	23
Naples	386	24
Odessa	382	25
San Jose	381	26
Orlando	377	27
Rapid City	372	28
Springfield, Mass	370	29
Los Angeles - Long Beach	367	30
San Diego	366	31
New London - Norwich	361	32
Bergen - Passaic	360	33
New York	357	34
Portland, Ore	357	34
Billings	347	36
Fort Walton Beach	345	37
Fort Myers - Cape Coral	343	38
Hartford - New Britain - Middletown - Bristol	342	39
Bellingham	341	40
Washington	340	41
Las Vegas	339	42
New Haven - Waterbury - Meriden	338	43
Toledo	338	43
Worcester - Fitchburg - Leominster	333	45
Sacramento	331	46
Midland, Tex	330	47
Rochester, Minn	330	47
Dallas	326	49
Bradenton	324	50
Oakland	323	51
Knoxville	322	52
Minneapolis - St. Paul	322	52
Abilene	320	54
Santa Cruz	320	54
Oklahoma City	319	56
Gainesville	313	57
Phoenix	312	58
Boise	311	59
La Crosse	311	59
Miami - Hialeah	311	59
Cheyenne	310	62
Daytona Beach	309	63
Fort Wayne	309	63
Austin	307	65
Houston	307	65
Green Bay	305	67
Monmouth - Ocean	303	68
New Orleans	303	68
Bryan - College Station	302	70
Vallejo - Fairfield - Napa	302	70
Providence - Pawtucket - Woonsocket	301	72
Santa Rosa - Petaluma	301	72
Ann Arbor	300	74
Lancaster	299	75
Spokane	298	76
Olympia	297	77
Santa Fe	297	77
Champaign - Urbana - Rantoul	296	79
South Bend - Mishawaka	296	79
Sioux Falls	294	81
Tallahassee	292	82
Akron	291	83
Tampa - St. Petersburg - Clearwater	291	83
Albuquerque	290	85
Kalamazoo	289	86
Nassau - Suffolk	289	86
Fargo - Moorhead	288	88
Trenton	288	88
Cleveland	287	90
Rochester, N.Y.	286	91
Bakersfield	285	92
Casper	285	92
Tacoma	284	94
Cincinnati	283	95
Glens Falls	283	95
Lafayette, La.	283	95
San Angelo	283	95
Atlanta	281	99
Chico	281	99

BY ADI

ADI NAME	Sales Per Capita	Ranking
Santa Barbara - Santa Maria - San Luis Obispo	524	1
Boston	474	2
San Francisco	464	3
Sarasota	462	4
Salisbury	444	5
Flagstaff	435	6
Denver	398	7
West Palm Beach	390	8
Miami	372	9
Los Angeles	370	10
Springfield, Mass	370	10
San Diego	366	12
Reno	361	13
Salinas - Monterey	361	13
Seattle - Tacoma	359	15
Grand Junction	343	16
Madison	342	17
Hartford - New Haven	336	18
Portland - Poland Spring	336	18
Las Vegas	333	20
Eureka	325	21
Ft. Myers - Naples	318	22
New York	316	22
Palm Springs	313	24
Providence - New Bedford	312	25
Burlington - Plattsburgh	311	26
Portland, Ore	310	27
Washington, D.C.	308	28
Orlando - Daytona Beach - Melbourne	305	29
Glendive	304	30
Helena	304	30
Rochester, N.Y.	292	32
Gainesville	291	33
Billings - Hardin	289	34
Minneapolis - St. Paul	289	34
Panama City	288	36
Phoenix	288	36
Sacramento - Stockton	288	36
Austin, Tex.	285	39
Bakersfield	285	39
Odessa - Midland	281	41
Houston	279	42
Chico - Redding	272	43
Cheyenne	270	44
Dallas - Ft. Worth	269	45
Milwaukee	268	46
Tampa - St. Petersburg	267	47
Toledo	267	47
Butte	266	49
Casper - Riverton	266	49
Mankato	263	51
Bend	262	52
Charlottesville	261	53
Oklahoma City	261	53
Albany - Schenectady - Troy	260	55
New Orleans	260	55
Chicago	257	57
Detroit	257	57
Philadelphia	255	59
Cleveland	253	60
Lima	253	60
Yakima	253	60
Florence, S.C.	252	63
Boise	250	64
Medford	249	65
San Angelo	246	66
Traverse City - Cadillac	246	66
Colorado Springs - Pueblo	244	68
La Crosse - Eau Claire	244	68
Roswell	243	70
Duluth - Superior	242	71
Atlanta	240	72
Cincinnati	240	72
Missoula	240	72
Spokane	240	72
Bangor	239	76
El Centro - Yuma	238	77
Ft. Wayne	238	77
Harrisburg - York - Lancaster - Lebanon	236	79
North Platte	236	79
Rapid City	236	79
Tucson	236	79
Syracuse	235	83
Albuquerque	234	84
Eugene	233	85
Lafayette, Ind.	230	86
Great Falls	229	87
Green Bay	228	88
Kansas City	227	89
Omaha	227	89
Biloxi - Gulfport - Pascagoula	224	91
Norfolk - Portsmouth - Newport News - Hampton	224	91
Buffalo	223	93
Knoxville	223	93
Victoria	223	93
Baltimore	221	96
Grand Rapids - Kalamazoo - Battle Creek	220	97
Columbus, Ohio	219	98
Corpus Christi	218	99

continued on page 228

TOP 100 RAI MARKETS

BY METRO AREA 1985

Metro Area Name	RAI	Ranking
Honolulu	232	1
Panama City	188	2
San Francisco	180	3
Anchorage	171	4
Kalamazoo	154	5
Boston - Lawrence - Salem - Lowell - Brockton	148	6
Green Bay	148	6
Anaheim - Santa Ana	144	8
New York	144	8
Salinas - Seaside - Monterey	143	10
Fort Walton Beach	139	11
Houma - Thibodaux	139	11
Madison	139	11
Ann Arbor	138	14
Fort Lauderdale - Hollywood - Pompano Beach	136	15
Champaign - Urbana - Rantoul	135	16
Lafayette - West Lafayette	135	16
Atlantic City	134	18
Oklahoma City	134	18
Atlanta	133	20
Portland, Ore	132	21
Biloxi - Gulfport	130	22
Lafayette, La	130	22
Lexington-Fayette	130	22
San Diego	130	22
Savannah	130	22
Orlando	129	27
Dallas	128	28
San Jose	128	28
Austin	127	30
Indianapolis	127	30
Seattle	127	30
Santa Barbara - Santa Maria - Lompoc	126	33
Bloomington, Ind	122	34
Cheyenne	122	34
Los Angeles - Long Beach	121	36
Washington	121	36
Columbia, S.C.	120	38
Grand Rapids	119	39
Muncie	119	39
Bloomington - Normal	118	41
Chicago	118	41
State College	118	41
Colorado Springs	117	44
Denver	117	44
Knoxville	117	44
Lincoln	117	44
Miami - Hialeah	117	44
Salem, Ore	116	49
Battle Creek	115	50
Fargo - Moorhead	115	50
Jacksonville, Fla	115	50
Lubbock	115	50
Norfolk - Virginia Beach - Newport News	115	50
Sarasota	115	50
Albuquerque	114	56
Amarillo	114	56
Fort Smith	114	56
Fort Wayne	114	56
Odessa	114	56
Abilene	113	61
Boise	113	61
Bryan - College Station	113	61
Huntsville	113	61
Louisville	113	61
Wichita Falls	113	61
Worcester - Fitchburg - Leominster	113	61
New Orleans	112	68
San Antonio	112	68
Santa Fe	112	68
South Bend - Mishawaka	112	68
West Palm Beach - Boca Raton - Delray Beach	112	68
Wilmington, N.C.	112	68
Burlington, Vt	111	74
Cincinnati	111	74
Columbus, Ohio	111	74
Flint	111	74
Houston	111	74
Nashville	111	74
Sacramento	111	74
Tallahassee	111	74
Tulsa	111	74
Hartford - New Britain - Middletown - Bristol	110	83
La Crosse	110	83
Las Cruces	110	83
Eugene - Springfield	109	86
Killeen - Temple	109	86
Lawrence, Kans	109	86
New London - Norwich	109	86
Santa Cruz	109	86
Tacoma	109	86
Bellingham	108	92
Bismarck	108	92
Daytona Beach	108	92
Greensboro - Winston-Salem - High Point	108	92
Melbourne - Titusville - Palm Bay	108	92
Bridgeport - Stamford - Norwalk - Danbury	107	97
El Paso	107	97
Fayetteville - Springdale	107	97

BY ADI

ADI NAME	RAI	Ranking
Flagstaff	146	1
Biloxi - Gulfport - Pascagoula	144	2
Salisbury	139	3
Boston	134	4
San Francisco	132	5
San Diego	130	6
Panama City	129	7
Lafayette, Ind	128	8
Santa Barbara - Santa Maria - San Luis Obispo	128	8
Miami	125	10
Los Angeles	123	11
Salinas - Monterey	123	11
Atlanta	121	13
Portland, Ore	120	14
Madison	119	15
Austin, Tex	118	16
Sarasota	115	17
Washington, D.C.	115	17
Seattle - Tacoma	114	19
Chicago	112	20
Dallas - Ft. Worth	112	20
Denver	112	20
Indianapolis	111	23
Oklahoma City	111	23
Orlando - Daytona Beach - Melbourne	111	23
New Orleans	110	26
Florence, S.C.	109	27
Norfolk - Portsmouth - Newport News - Hampton	108	28
Lima	107	29
New York	107	29
Bowling Green	105	31
Detroit	105	31
El Paso	104	33
Grand Rapids - Kalamazoo - Battle Creek	104	33
Houston	104	33
Baltimore	103	36
Columbus, Ohio	103	36
Hartford - New Haven	103	36
Jacksonville	103	36
Lansing	103	36
Columbia, S.C.	102	41
Springfield, Mass.	102	41
Cincinnati	101	43
Milwaukee	101	43
North Platte	101	43
West Palm Beach	101	43
Ft. Wayne	100	47
Gainesville	100	47
Las Vegas	100	47
Louisville	100	47
Rochester, N.Y.	100	47
Sacramento - Stockton	100	47
Savannah	100	47
Bakersfield	99	54
Colorado Springs - Pueblo	99	54
Toledo	99	54
Waco - Temple	99	54
Charleston, S.C.	98	58
Eugene	98	58
Ft. Smith	98	58
Green Bay	98	58
Jackson, Tenn.	98	58
San Antonio	98	58
South Bend - Elkhart	98	58
Cheyenne - Scottsbluff	97	65
Greensboro - Winston-Salem - High Point	97	65
Knoxville	97	65
Tulsa	97	65
Flint - Saginaw - Bay City	96	69
Minneapolis - St. Paul	96	69
Philadelphia	96	69
San Angelo	96	69
Kansas City	95	73
Lincoln - Hastings - Kearney	95	73
Albuquerque	94	75
Bend	94	75
Dayton	94	75
Palm Springs	94	75
Parkersburg	94	75
Springfield - Decatur - Champaign	94	75
Tampa - St. Petersburg	94	75
Tucson	94	75
Cleveland	93	83
Tallahassee - Thomasville	93	83
Wichita Falls - Lawton	93	83
Lexington	92	86
Lubbock	92	86
La Crosse - Eau Claire	91	88
Medford	91	88
Peoria	91	88
Boise	90	91
Odessa - Midland	90	91
Omaha	90	91
Phoenix	90	91
Portland - Poland Spring	90	91
Raleigh - Durham	90	91
Zanesville	90	91
Jonesboro	89	98
Nashville	89	98

TOP 100 RGI MARKETS

BY METRO AREA 1985 BY ADI

Metro Area Name	RGI	Ranking
Las Vegas	665	1
Reno	422	2
Atlantic City	400	3
Orlando	171	4
Honolulu	153	5
Rochester, Minn	152	6
Anchorage	150	7
Washington	141	8
Dallas	136	9
Bismarck	135	10
Huntsville	135	10
Charleston, S.C.	131	12
Houston	130	13
Minneapolis - St. Paul	128	14
Atlanta	127	15
Ann Arbor	126	16
Pascagoula	125	17
Phoenix	125	17
Casper	122	19
Miami - Hialeah	122	19
Montgomery	122	19
Newark	121	22
Baton Rouge	120	23
New Orleans	120	23
Beaver County, Pa.	119	25
Boston - Lawrence - Salem - Lowell - Brockton	119	25
Denver	118	27
Middlesex - Somerset - Hunterdon	118	27
San Jose	118	27
Albany, Ga.	117	30
Jackson, Miss.	117	30
Knoxville	117	30
Lafayette, La.	117	30
West Palm Beach - Boca Raton - Delray Beach	117	30
Baltimore	116	35
Iowa City	116	35
Lancaster	116	35
Nashville	116	35
Salt Lake City - Ogden	116	35
Augusta	115	40
Harrisburg - Lebanon - Carlisle	115	40
Philadelphia	115	40
Wilmington, Del.	115	40
Memphis	114	44
Raleigh - Durham	114	44
Savannah	114	44
Brazoria	113	47
Grand Rapids	113	47
Lansing - East Lansing	113	47
Tallahassee	113	47
Trenton	113	47
Houma - Thibodaux	112	52
Louisville	112	52
Manchester - Nashua	112	52
Pensacola	112	52
Chicago	111	56
Columbia, S.C.	111	56
Sioux Falls	111	56
Anniston	110	59
Binghamton	110	59
Jacksonville, Fla.	110	59
Kansas City	110	59
St. Louis	110	59
Salinas - Seaside - Monterey	110	59
San Francisco	110	59
Florence, S.C.	109	66
Hagerstown	109	66
Bremerton	108	68
Charlotte - Gastonia - Rock Hill	108	68
Fort Worth - Arlington	108	68
Hartford - New Britain - Middletown - Bristol	108	68
Little Rock - North Little Rock	107	72
Los Angeles - Long Beach	107	72
Macon - Warner Robins	107	72
Madison	107	72
New York	107	72
Beaumont - Port Arthur	106	77
Bergen - Passaic	106	77
Birmingham	106	77
Burlington, Vt.	106	77
Decatur	106	77
Flint	106	77
Lexington-Fayette	106	77
Mobile	106	77
Cincinnati	105	85
Columbia, Mo.	105	85
Grand Forks	105	85
Indianapolis	105	85
Saginaw - Bay City - Midland	105	85
Asheville	104	90
Charlottesville	104	90
Cheyenne	104	90
Jackson, Tenn.	104	90
San Diego	104	90
Tuscaloosa	104	90
Galveston - Texas City	103	96
Hickory	103	96
Jersey City	103	96
Lake Charles	103	96
Laredo	103	96

ADI NAME	RGI	Ranking
Las Vegas	654	1
Reno	385	2
Philadelphia	138	3
Flagstaff	130	4
Washington, D.C.	130	4
Orlando - Daytona Beach - Melbourne	127	6
Charleston, S.C.	124	7
Baton Rouge	123	8
Houston	122	9
Atlanta	120	10
Savannah	119	11
Dallas - Ft. Worth	117	12
Jackson, Miss.	115	13
Phoenix	115	13
Baltimore	114	15
New Orleans	114	15
Jacksonville	112	17
Miami	111	18
Montgomery	111	18
Augusta	110	20
Salt Lake City	110	20
Columbia, S.C.	109	22
Hagerstown	109	22
Harrisburg - York - Lancaster - Lebanon	109	22
Knoxville	109	22
Macon	109	22
Mobile - Pensacola	108	27
West Palm Beach	108	27
Alexandria, La.	107	29
Boston	107	29
Tallahassee - Thomasville	107	29
Louisville	106	32
Minneapolis - St. Paul	106	32
Lake Charles	105	34
Lansing	105	34
Chicago	104	36
Columbus, Ga.	104	36
Denver	104	36
Los Angeles	104	36
New York	104	36
San Diego	104	36
San Francisco	104	36
Tuscaloosa	104	36
Biloxi - Gulfport - Pascagoula	103	44
Bristol - Kingsport - Johnson City	103	44
Charlotte	103	44
Florence, S.C.	103	44
Nashville	103	44
Albany, Ga.	102	49
Beaumont - Port Arthur	102	49
Detroit	102	49
Huntsville - Decatur - Florence	102	49
Lafayette, La.	102	49
St. Louis	102	49
Birmingham	101	55
Grand Junction	101	55
Memphis	101	55
Raleigh - Durham	101	55
Roanoke - Lynchburg	101	55
Binghamton	100	60
Charlottesville	100	60
Cincinnati	100	60
Greensboro - Winston-Salem - High Point	100	60
Kansas City	100	60
Norfolk - Portsmouth - Newport News - Hampton	100	60
Tampa - St. Petersburg	100	60
Alpena	99	67
Bluefield - Beckley - Oak Hill	99	67
Casper - Riverton	99	67
Glendive	99	67
Lafayette, Ind.	99	67
Richmond	99	67
Chattanooga	98	73
Laredo	98	73
Rochester, N.Y.	98	73
Hartford - New Haven	97	76
El Paso	96	77
Harrisonburg	96	77
Pittsburgh	96	77
Columbus, Ohio	95	80
Dothan	95	80
Lexington	95	80
Meridian	95	80
Milwaukee	95	80
Monroe - El Dorado	95	80
Parkersburg	95	80
Cleveland	94	87
Grand Rapids - Kalamazoo - Battle Creek	94	87
Laurel - Hattiesburg	94	87
Columbus - Tupelo	93	90
Shreveport - Texarkana	93	90
Tucson	93	90
Flint - Saginaw - Bay City	92	93
Greenville - Spartanburg - Asheville	92	93
Indianapolis	92	93
Palm Springs	92	93
San Antonio	92	93
Bakersfield	91	98
Jackson, Tenn.	91	98
Salinas - Monterey	91	98
Seattle - Tacoma	91	98